



European Monitoring Centre
for Drugs and Drug Addiction

EN

Drug-related health and security threats in the Western Balkans

Regional report

2022



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Introduction

This report provides a regional overview of the drug situation in the Western Balkans. For the purposes of this analysis the region comprises four candidate countries (Albania, Montenegro, North Macedonia and Serbia) as well as two potential candidates to the European Union – Bosnia and Herzegovina and Kosovo ⁽¹⁾.

The EMCDDA has been working with the Western Balkans since 2008 in the development and implementation of technical cooperation projects financed by the Instrument for Pre-accession Assistance (IPA) of the European Commission (EC). The objective of these projects is to familiarise the beneficiaries with EU policies and working methods and to prepare them for consolidated and structured reporting to the EMCDDA.

The analysis presented here aims to address some of the knowledge gaps in the regional drug situation by bringing together the available information on patterns of drug use and its consequences, within the context of drug policies and responses, as well as looking at the data on drug production, trafficking and supply, and how these may impact on broader security-related concerns. By analysing together health and security data, the intention is to provide a more holistic and strategically oriented understanding of the drug situation than would be derived from looking at these areas separately. However, while every attempt has been made to use all the information currently available, and where possible to validate conclusions drawn from multiple sources, serious data limitations do exist in some areas. Moreover, expert opinions, which can provide useful insights, have been used in this report, but it is not possible to empirically validate such assessments. In view of these facts, caution must be exercised in drawing conclusions from the available data, and correspondingly attention has been given to identifying important knowledge gaps that merit future research and analysis.

The analysis presented here suggests that Western Balkan criminal networks appear to have become key actors in both the regional and EU drug markets. In part this reflects the geographical position of the Western Balkans, which lies at the intersection of a number of major drug trafficking routes, most notably the Balkan route for heroin, but also now, potentially, some emerging routes for other drugs, including cocaine. The impact of these drug flows on security, governance and the rule of law appears to be

considerable and has implications both for the region and the EU. There is also evidence to suggest that some criminal networks from this region have a significant operational presence within the EU.

While the available data indicate that overall drug use in the region seems to be low by international standards, notable differences in patterns of use can be observed between countries, and across different age groups and substances. An important caveat concerning the available prevalence data in the region is that the low willingness to report drug use and the social stigma associated with using drugs may lead to under-reporting.

An ongoing need exists to monitor the harms associated with opioid and cocaine use in this region, as there is some evidence to suggest that the use of these substances is evolving in ways that could have important implications for the future. More generally, with respect to service delivery, the data indicate an overarching need in the region to increase the provision of treatment and other services for people with drug problems. In particular, responses targeting harmful patterns of use for non-opioid drugs appear to be currently underdeveloped, while at the same time needs in this area may be growing.

The regional overview presented in this report begins with an analysis of the drivers and facilitators of the regional drug market. This is followed by a review of drug policy developments and existing legal and regulatory approaches. The text then considers what information can be gathered from the available data on patterns of drug use, response measures and harms associated with drug consumption. The impact of the drug market in the Western Balkans and the role and effect of Western Balkan criminal networks in the EU are then analysed. The report concludes with a regional overview of each of the major drug types found in the area, focusing on use, production and trafficking.

Methods and data

Monitoring patterns and trends in hidden and stigmatised behaviours like drug use, or criminal activities such as drug trafficking, is both practically and methodologically challenging. The availability of drug-related information is also overall relatively limited in the region, although this varies to some extent between countries. For this reason, multiple sources of data are used to support the analysis

⁽¹⁾ This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

presented here. However, due to the inherent limitations in the data available, caution is required in interpreting them, in particular when countries are compared on any single measure.

National authorities are making efforts to improve data availability but often struggle with underdeveloped infrastructure for routine monitoring. For example, treatment registers for people who use drugs only exist in Montenegro and Serbia. Serbia is also the only country that has an officially established special mortality register for recording drug-related deaths, although some data on this topic are also routinely reported by Albania, Kosovo and North Macedonia.

In some instances, where information does exist, the data is outdated or methodological information is not accessible, complicating interpretation and analysis. Notably, for example, there is a lack of information regarding the methods used to construct the 2012 estimate of injecting drug use for Bosnia and Herzegovina, and with respect to the coverage estimates for the provision of harm reduction and opioid agonist treatment reported by a number of international organisations. Often, data from treatment and mortality registers have limited geographical coverage or are not yet fully aligned with EMCDDA protocols. It is also noteworthy that the collection of much of the health-related data that are available from the region has been supported by international organisations. The Global Fund, for example, has financed a number of bio-behavioural studies. The EMCDDA has also supported general population surveys, in addition to the European Web Survey on Drugs (EWSD) ⁽²⁾, and co-funded the work of the European School Survey Project on Alcohol and Other Drugs (ESPAD) ⁽³⁾ within the region.

Data on security-related indicators, such as drug law offences, drug seizures, drug composition and prices have been collected from the ministries of the interior, justice and customs in the Western Balkans. Efforts have been made to collect and submit security-related data to the EMCDDA in line with its standard protocols, and this is an area in which all countries in the region have made some progress. However, the overall comparability and comprehensiveness of these data remain problematic. For example, while all countries provide data on drug seizures, it is clear that they are not always fully accurate or complete. Further, not all countries have been able to provide data on some important topics, such as the

numbers of drug offences, or drug availability measures, such as the potency/purity of drug seizures and estimated prices.

To overcome some of the information gaps, the analysis provided here also draws on research conducted by the Global Initiative Against Transnational Organized Crime (GI-TOC). This EMCDDA-commissioned project included questionnaires and semi-structured interviews with over 20 stakeholders in the Western Balkans. A number of focus groups were also conducted and a review was undertaken of the available scientific and grey literature published by both governmental and non-governmental entities.

Data have also been drawn from some additional studies conducted or supported by the EMCDDA and information provided to the EMCDDA by the national drug observatories (NDOs). In the absence of an NDO, data have been provided by the EMCDDA-IPA7 national correspondents using routine and established reporting tools. References are provided for all data sources and literature used in the analysis. Unless specified otherwise, qualitative data presented here come from interviews and focus groups conducted specifically for this project.

⁽²⁾ For further information see https://www.emcdda.europa.eu/activities/european-web-survey-on-drugs_en.

⁽³⁾ For further information see https://www.emcdda.europa.eu/about/partners/espad_en.

Key findings

Drivers and facilitators

- The Western Balkan region lies at the intersection of several major drug trafficking routes. Cannabis, cocaine, heroin, synthetic drugs and precursors are smuggled into and out of the region (see Figure 1).
- Globalisation and the travel and transport infrastructure associated with this appears to have been increasingly exploited by Western Balkan criminal networks. This is most evident for cocaine, where some

networks now appear to be involved across the whole supply chain, from production in South America and importation into the EU, to both wholesale and local distribution. The large demand for drugs in the EU and the high profits linked to drug supply also appear to be key drivers for these developments and seem to have emboldened Western Balkan criminal networks to become involved across many aspects of the supply chain for illicit drugs.

- Criminal networks have adopted encrypted communication and may use online markets and

FIGURE 1
The Western Balkans' main drug trafficking routes



Inbound, outbound and internal trafficking routes identified in the Western Balkans for herbal cannabis, cocaine, heroin and synthetic drugs.
Source: EMCDDA and GI-TOC.

cryptocurrencies to try to evade law enforcement measures. This suggests that the drug market in the region is becoming more digitally enabled, and that technology and linked operational innovations are providing benefits to criminal networks involved in drug production, trafficking and money laundering.

- ▶ The internal environment in the region, particularly with respect to corruption, also acts as a facilitator for the entrenchment and expansion of Western Balkan criminal networks.

Drug policy and law

- ▶ Drug-related policy documents that largely follow the structure and content of existing EU policies and action plans have been adopted by Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia.
- ▶ Only North Macedonia and Serbia currently seem to have an operational drug observatory; and only Serbia has an active national early warning system.
- ▶ The capacity for drug monitoring in the region is underdeveloped. This is especially true with respect to many health-related topics, but supply-side indicators are also inadequate. For this situation to improve there needs to be greater recognition among national stakeholders of the value of information collection, political support for data collection activities and sustained investment for data collection efforts.
- ▶ Although drug use per se is not specifically criminalised in the region, the possession of drugs is a criminal offence in the Federation of Bosnia and Herzegovina, Kosovo and Serbia, while it is an administrative offence in Albania, Montenegro, North Macedonia and the rest of Bosnia and Herzegovina.

Use, harms and responses

- ▶ Drug use in the region appears to be low overall by international standards, although an important caveat here is that there are differences between countries with respect to patterns of use and the substances involved. Drug use is reported more by men than women, and this gap is large in some countries. As highlighted earlier, data limitations also inhibit the production of accurate estimates of drug prevalence. The prevalence data that do exist for the region may also underestimate the numbers

involved, due to a lack of willingness to report drug use and the social stigma associated with using drugs.

- ▶ High-risk and particularly damaging patterns of drug use in the region appear to be predominantly associated with the use of heroin and other opioids, such as buprenorphine and methadone. However, in some countries powder cocaine and crack cocaine have also been linked to injecting drug use and drug-related deaths.
- ▶ Rates of HIV infection among people who inject drugs in the region are generally low, while the prevalence of hepatitis C infection varies substantially between countries and rates are in general comparable to those observed in the EU. However, some of the data in this area are now quite old and further studies are required to understand if they remain applicable to the current situation.
- ▶ Most drug-related deaths reported from the region were associated with the use of opioids, either heroin or methadone, sometimes in combination with benzodiazepines. The number of deaths where cocaine was found to be present was also relatively high in some countries. However, an important caveat here is that the weakness of the data makes it difficult to comment with confidence on levels of drug-related deaths, and considerable uncertainty exists in this area.
- ▶ Harm reduction services operate in all countries of the region. However, the provision of harm reduction interventions appears to be generally insufficient to meet the countries' needs and is often dependent on international funding. Non-governmental organisations play a significant role in the provision of harm reduction and opioid agonist therapy in most of the countries.
- ▶ The treatment available is predominantly configured to meet the needs of those with opioid problems. Those entering specialised drug treatment for problems with other substances are generally very low. This is thought to reflect, in part at least, a lack of service availability.

The impact of drug markets and criminal networks in the Western Balkans and the EU

- ▶ Western Balkan criminal networks have a significant impact on security, governance and the rule of law in the region. Some of these networks also appear to be active in the EU, with involvement in the production, trafficking and distribution of drugs.

- ▶ One of the most concerning security threats this generates is the violence associated with competition for drug markets and control of trafficking routes. This has an impact on levels of violent crime both within the region and in the EU. For example, a number of homicides in the EU have been linked to Western Balkan criminal networks involved in the cocaine trade.
- ▶ Organised criminal networks from the Western Balkans appear to be poly-criminal, often engaged primarily in drug trafficking but also in other illicit activities, including weapons smuggling, human trafficking and money laundering.
- ▶ Some of these networks appear to have expanded their operational presence in the EU drugs market. This is linked to a greater involvement in the cocaine supply chain, which now includes activities in Latin America, but also appears to be connected to an involvement in cannabis production in some EU countries.

Cannabis

- ▶ Cannabis is the most consumed illicit drug in the region, and its use appears to have increased in recent years, especially among young people.
- ▶ Patterns of cannabis cultivation in the region are shifting and diversifying. Significantly less cannabis is cultivated outdoors in Albania than in the past, while large-scale indoor cannabis cultivation sites have been recorded in more countries in the region.
- ▶ There are concerns that some cannabis produced legally for medical purposes may be diverted to the illicit market. Cannabis production for medical use has been legalised in North Macedonia, while a similar move is being discussed in Albania.
- ▶ It appears that some criminal networks from the Western Balkans have adopted a new business model of direct involvement in cannabis production within the EU. Their presence in a number of EU countries, primarily associated with indoor production facilities, has been noted.
- ▶ There are indications that some of the cannabis produced in the Western Balkans is trafficked to Türkiye, where it is exchanged for heroin.

Cocaine

- ▶ Based on the available general population survey data, cocaine is the second most commonly reported illicit drug, after cannabis, among the adult population in the Western Balkans. However, some of these surveys are outdated and other forms of drug use, particularly more stigmatised forms and substances of use, such as related to opioids, may be underestimated by these survey methods. Injecting cocaine, alone or in combination with heroin, and the use of crack cocaine have also been reported in some countries.
- ▶ Drug seizures over the past two years indicate that the importance of seaports in the Western Balkans, particularly in Albania and Montenegro, has increased markedly, although the quantities seized are still low compared with those captured at some major EU ports.
- ▶ Criminal networks from or with strong links to the Western Balkan region have emerged as major players in the EU cocaine market and appear to be involved in the movement of the drug from Latin America directly to European ports. They now are reported to maintain a presence in key cocaine export and import locations in both Latin America and the EU.

Heroin and other opioids

- ▶ Heroin is the most commonly used opioid across the region, although methadone is more commonly used in Kosovo and North Macedonia. An illicit market for diverted methadone and buprenorphine has been reported in some countries.
- ▶ Regional heroin seizures seem to be generally stable. Most of the heroin appears to pass through the region on its way to the EU by land or sea routes.
- ▶ No significant changes in heroin trafficking have been noted in recent years. However, the phenomenon of heroin being exchanged for locally produced herbal cannabis is an issue that has raised concern and requires further investigation and monitoring.
- ▶ Some of the acetic anhydride (the precursor chemical for heroin production) that is diverted from legal supply in the EU passes through the Western Balkan region on its way to heroin production areas.

Synthetic drugs

- ▶ Amphetamine is the most seized and consumed synthetic drug in the region, although levels of MDMA use in some countries are now probably comparable.
- ▶ Synthetic drug markets in the Western Balkan region seem to be very dynamic, and are thought to be supplied mostly from production taking place in the EU. However, some local production has also been reported and this development may represent an important threat in the future.
- ▶ It is likely that precursors for synthetic drug production pass through the region towards the EU.
- ▶ Criminal networks from the Western Balkans appear to be less involved in synthetic drug trafficking compared to other drugs.

Drivers and facilitators

There are several key drivers and facilitators of the regional drug market in the Western Balkans. This market is complex, highly adaptable and innovative, enabled by factors such as the growing transport infrastructure, the region's strategic location, globalisation and technological advancements. These factors have resulted in drug production and trafficking becoming increasingly integrated regionally and globally. In addition, the use of the internet and the effect of information and communication technology on all segments of society have provided new opportunities for organised crime in a number of essential areas, including logistics, criminal cooperation and financial flows. Corruption has also become an enabler of criminal networks and undermines governance and the rule of law.

Strategic geographic location and globalisation

One of the key drivers of drug trafficking in the Western Balkans appears to be its location between countries involved in drug production and supply and countries with a high demand for drugs, particularly in the EU. As a reported major transshipment hub for the trafficking of cannabis and heroin, and more recently cocaine, the region is connected to EU markets by highways, maritime ports, railways and airports. Major investments from the EU and China (as part of the Belt and Road Initiative), as well as Türkiye, Russia and some Gulf States (such as the United Arab Emirates) are improving the region's infrastructure. However, this development does not appear to have been met with a corresponding increase in investment in security and border management (GI-TOC, 2022).

The region is also well connected to international financial markets, yet is reported to fall short of European and international standards in some aspects of regulating the integrity of its financial markets, making it vulnerable to illicit financial flows and money laundering (Cartwright and Amerhauser, 2022; Reitano and Amerhauser, 2020).

Globalisation and increased flexibility in travel and relocation have also appeared to have been exploited by Western Balkan criminal networks. Some of these networks appear to be involved in the whole supply chain of the cocaine trade, from the coca fields of South America to distribution on the streets of major European cities. These networks also often appear to collaborate closely with other criminal networks operating at different points

in the supply chain, for example local groups involved in the production or distribution of drugs. Links with other internationally active crime networks have also been observed, for example between Albanian-speaking groups and Italian criminal networks. Such networks also appear to exploit or recruit from diasporas located in the EU to further their criminal activities.

Demand, supply and profits

Another driver for drug production and trafficking in the Western Balkan region appears to be the demand for cannabis within the region as well as in the EU and Türkiye. The large demand for herbal cannabis in the EU, for example, may have contributed to some Western Balkan criminal networks relocating to EU countries to be closer to these consumer markets, where they appear to be increasingly involved in setting up and running cannabis cultivation sites.

Increased cocaine production in South America has reportedly also provided new opportunities for Western Balkan criminal networks to smuggle large quantities of cocaine directly to both the Western Balkans and Europe. Cutting out the middlemen appears to have enabled these networks to accrue higher profits (see also the section '[Cocaine: use and supply](#)').

As criminal groups from the Western Balkans have become increasingly mobile, agile and successful, the wealth and power this brings has created an attractive profile that some people aspire to emulate. As a result, some young people (mostly young men) from marginalised communities are tempted to become involved in these groups. This has been supported at times by music and social media content that has glamorised the activities of some groups, often identified along ethnic lines.

Technological developments facilitating criminal activities

Criminal networks from the Western Balkan region are seen to embrace the latest technology to improve the efficiency of drug production, trafficking and money laundering, such as complex equipment for indoor cultivation, the use of drones, encrypted communications (Jeremic et al., 2022; Slobodna Bosna, 2021) and

cryptocurrencies (Grauer and Jardine, 2022). Sophisticated criminal networks also seem to have adopted the use of encrypted communications (Europol, 2021b; Politiko, 2022b). With new developments in technology, experts have identified a risk that drones may be increasingly used for transporting drugs in the future. This represents a possible future threat in terms of drugs trafficked from the Western Balkans to neighbouring EU countries.

Although it cannot be empirically substantiated, it is reported that people who use drugs in the Western Balkans are increasingly using digital technology to facilitate drug purchasing. This could enable criminal networks to reach a larger number of potential customers and create greater challenges for law enforcement interdiction. Different types of drugs are reported to be available across various online platforms in the region, including the darknet but also through social media applications and platforms (Biznis & Finansije, 2020). For example, people can order cannabis and MDMA directly via Instagram (CDM, 2019). The online drug market may have become more important as a source of supply during the COVID-19 pandemic, when restrictions on movement impeded people who use drugs from directly interacting with drug dealers (EMCDDA, 2021a).

Based on a study of cryptocurrency transactions on the blockchain, it seems that drug vendors from the Western Balkans are present on darknet markets, but not on the same scale as EU-based sellers (Grauer and Jardine, 2022). The use of cryptocurrency is regulated in some of the countries in the region. For example, North Macedonia has banned the use of cryptocurrencies (Chakraborty, 2021), while Kosovo has taken legal steps to prohibit cryptocurrency mining due to the energy-intensive nature of these activities (Bami, 2022). In Bosnia and Herzegovina, there are currently no regulations regarding the use of cryptocurrencies. However, the Central Bank has stated that only official currency can be used for making payments (Vijesti, 2018). Cryptocurrencies are unregulated in Montenegro (Veljović and Vučinić, 2022), while Albania and Serbia have regulated their use (Kalo & Associates, 2020; Gurcan Partners, 2022).

Internal environment

Corruption appears to be an enabler of drug production and trafficking in the region (France24, 2019; GI-TOC, 2021b). While assessing the scale of the problem is difficult, several cases of officials being arrested for facilitating or being involved in drug trafficking have been

noted, and links have been observed between state officials and criminal groups. For example, in March 2021, it was reported that several police officers from Bosnia and Herzegovina were working as part-time personal bodyguards for a well-known criminal figure. While the officers were dismissed from the police, they reportedly continued to work for this person (Avdić, 2021). In Serbia, based on the Ministry of Interior annual reports, 44 criminal charges were filed against police officers for drug-related criminal offences between 2017 and 2020 (Ministry of Interior of Serbia, 2018, 2019, 2020b, 2021).

The Global Organized Crime Index indicates that state-embedded criminal actors may play an important role in facilitating illicit economies and inhibiting countries' resilience to organised crime in the Western Balkans. According to the Index, some countries in the Western Balkans (such as Bosnia and Herzegovina and Serbia) have some of the highest scores in Europe in terms of state-embedded criminal actors (GI-TOC, 2021b). The Index also indicates that mafia-style groups may make use of corruption to enjoy protection in some countries of the region. These types of conditions may create an environment that enables drug trafficking and other types of organised crime (GI-TOC, 2021b).

Another driver of involvement in drug markets in the region may be the lack of legitimate employment opportunities, particularly in marginalised communities. This may propel some people into drug trafficking and drug cultivation, and it appears that this trend may have been exacerbated by COVID-19.

Drug policy and the law

Drug policy documents are intended to reflect the priorities of national governments in addressing drug-related issues. Specific drug-related policy documents that largely follow the structure and content of existing EU policies and action plans – with a focus on drug demand reduction, drug supply reduction and cross-cutting issues like monitoring and coordination – have been adopted by Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia (see also the box '[National drug monitoring systems](#)'). In Albania, the relevant and active drug policy documents only cover drug issues in relation to organised crime. The drug strategies in Montenegro and Serbia have technically expired, but they continue to guide the actions of national stakeholders. All countries in the region with drug-specific strategies recognise the need for harm reduction services. Albania, which does not have a drug strategy, stresses the need for HIV-specific harm reduction in its National Action Plan on HIV/AIDS 2020-2025.

Drug law offences are usually stipulated in the Criminal Code of individual countries in the Western Balkans. In addition, Montenegro and North Macedonia address the possession and use of drugs in specialised laws on the control of narcotic substances or the prevention of drug use. Drug use is not prohibited, except in public spaces. Drug possession offences differ widely between countries in the region. The possession of small quantities of drugs for personal use is exempted from punishment in Albania, while it is treated as an administrative offence in

Montenegro and North Macedonia and as a criminal offence in Kosovo and Serbia. In Bosnia and Herzegovina, offences related to drug use and the possession of small quantities of drugs are regulated by the entities and Brčko District. In the Federation of Bosnia and Herzegovina, possession for personal use is a criminal offence, while in Republika Srpska and Brčko District it is considered a minor offence.

In North Macedonia, where the medical use of cannabis has been legal since 2016, the Law on the Control of Narcotic Drugs and Psychotropic Substances has recently been updated, providing a legal basis for the production of cannabis for medical purposes. There are concerns, however, that medical cannabis production in North Macedonia has been targeted by criminal networks, with reports that large volumes of medical cannabis may have been stolen by criminal groups, and that illicit cultivation is sometimes taking place in the midst of cultivation for medical purposes (see the section '[Cannabis: use, production and supply](#)'). Discussions about the medical use of cannabis are currently ongoing in Albania, where in a survey of more than 500 000 citizens commissioned by the government in 2022, over 60 % of respondents favoured legalising the medical use of cannabis (Kote, 2022b).

National drug monitoring systems

While national drug policy documents and strategies in the Western Balkans envisage functioning drug monitoring systems, or at least improvements to some of their components, only North Macedonia and Serbia currently have an operational drug observatory; and only Serbia has an operational national early warning system. Overall, there are substantial gaps in drug monitoring and in the responses available to address drug problems (see also the section '[Responses to drug use and harms](#)'). A more systematic and coordinated approach to building national drug information systems, including harmonisation with EU standards, is still required in most of the Western Balkan countries.

Drug use, harms and responses

Drug use in the Western Balkans

The accurate assessment of trends in drug prevalence in the region is impeded by the lack of robust and recent studies. However, based on the available general population surveys and surveys among school-aged children, the proportions of those that report any drug use in the Western Balkans are generally low when compared to similar indicators in the EU Member States. Differences do appear to exist, however, between the countries with respect to patterns of use across substances and age groups. For instance, survey results on cannabis use are generally comparable to what would be regarded as low-prevalence EU countries, some of which border the Western Balkans (such as Bulgaria, Romania and Greece). In comparison, estimated cocaine use among young adults (aged 15-34) in Albania in 2014 and in North Macedonia in 2017 was reported to be much higher than the EU average in 2020 (EMCDDA, 2022). Some of the survey data available are now quite old and, more generally, the extent of response and non-response biases should always be considered when reviewing the findings from surveys and drawing comparisons between countries. The fact that trends in drug use can change quite rapidly further underscores the need for more recent studies, conducted using robust methods, to provide a better understanding of developments in drug consumption patterns within the region.

Overall, the data would suggest that cannabis remains the most commonly used illicit drug in the region, followed by cocaine. Practitioners have observed that both of these drugs have become more widely used, although, as noted previously, empirically informed trends-based analyses are not currently possible due to the lack of available data. Cannabis use is predominantly found among young people, while cocaine use appears to be more frequently used by the urban middle class and in holiday resorts across the region. In addition, cocaine-related deaths have been reported in Albania and North Macedonia, while among more marginalised groups the injecting of cocaine and the use of crack cocaine has also been noted in several countries.

High-risk, long-term and chronic drug problems in the region appear to be associated predominantly with heroin and other opioids such as buprenorphine and methadone, although in some countries, as noted earlier, cocaine and crack cocaine are known to be used among certain vulnerable groups of people. Recent estimates of the

numbers using opioids or injecting drugs are largely lacking. Moreover, data on treatment, which could provide another window on these behaviours, are preliminary in nature and currently only available for 2019 and for 2020. As the COVID-19 pandemic impacted on treatment seeking and provision in 2020, this prevents any assessment of underlying trends.

The information available on patterns of use of synthetic drugs suggests that the situation across the region is quite heterogeneous. For example, estimates of MDMA (ecstasy) use in Montenegro and amphetamine use in Montenegro and North Macedonia among adults are higher than the EU averages, but this is not the case elsewhere. Similarly, data reported by the European School Survey Project on Alcohol and Other Drugs (ESPAD) point to levels of amphetamine use similar to or greater than the EU average among adolescents in Montenegro and Serbia. The available data also suggest that the use of new psychoactive substance (NPS) is not common, although an important caveat here is that this conclusion is based on limited data. Moreover, expert opinion indicates that synthetic cannabinoid use may be on the rise in Serbia. A general problem is that the experts interviewed for this study noted a number of new and potentially important trends in drug use that could not be empirically substantiated because of a lack of studies. These qualitative reports will therefore need to be followed up in future quantitative research or monitoring.

A potential issue in estimating drug use in the region is the reluctance to admit behaviours that are highly stigmatised and generally disapproved of, leading to non-response or response bias (see the box '[Stigma and attitudes to drug use](#)'). This issue is not unique to the Western Balkans, but it may have important implications for the interpretation of both current and future prevalence estimates and for the design of future studies.

Rates of under-reporting may also vary across important demographic variables such as gender. Generally, men seem to be more willing than women to report their drug use in surveys conducted in the Western Balkans. While in some countries, such as Bosnia and Herzegovina, differences in reporting levels seem to be acute, elsewhere in the region (for instance in Montenegro and Serbia) the reported prevalence of drug use reported by women is only slightly lower than that found among men. Women also seem to be rarely counted among treatment entrants or as clients of harm reduction services – which may be linked to stigma and the lack of female-specific services, rather

Stigma and attitudes to drug use

Social stigma associated with drug use and directed at those who use drugs appears common in the Western Balkans. In national representative surveys of the adult population, conducted between 2014 and 2018, a majority of respondents expressed disapproval of drug use and there was a widespread perception of people with substance use disorders as criminals. However, expert opinion and some data suggest that these attitudes may now be changing, at least with respect to recreational drug use. There are some indications that cannabis and some forms of cocaine use are becoming more socially acceptable. However, levels of social

stigma appear to remain high with respect to drug use among marginalised or excluded groups, those who have problems and seek help, and those who use opioids or inject drugs.

Expert opinion also describes how drug use has been glamourised in social media and by celebrities, often being associated with 'get-rich' lifestyles and violence. The social media profiles of several well-known criminals or people closely associated with criminal networks in Bosnia and Herzegovina have attracted more than half a million followers.

than being reflective of the overall need for services by women who use drugs. For example, even in Montenegro, where surveys show differences in drug use between men and women to be less pronounced compared with other countries in the region, no women participated in a bio-behavioural survey among people who inject drugs that recruited participants through local harm reduction programmes. While gender differences may, and almost certainly do, exist with respect to patterns of drug use, these may be accentuated by problems of under-reporting. Thus it seems likely in this last example that stigma may act as a barrier for women both in terms of accessing services and engaging in research studies, and the results cannot be assumed to necessarily imply that there are no, or very few women, who inject drugs in Montenegro.

Perceived availability of drugs

Experts reported that most illicit drugs were perceived as easily accessible in the region, especially in large cities (see also the box '[COVID-19 and the availability of drugs](#)'). Some quantitative data are available in relation to perceptions around the availability of substances from the 2019 ESPAD survey of 15- to 16-year-old school students (ESPAD, 2021), which included four Western Balkan countries. The results from these countries can be compared with those of all countries that participated in the ESPAD study (see Figure 2). For example, in comparison with the average reported across all countries participating in the study, a higher proportion of students in Montenegro and Serbia reported that cocaine and synthetic stimulants were fairly or very easily accessible.

Harms

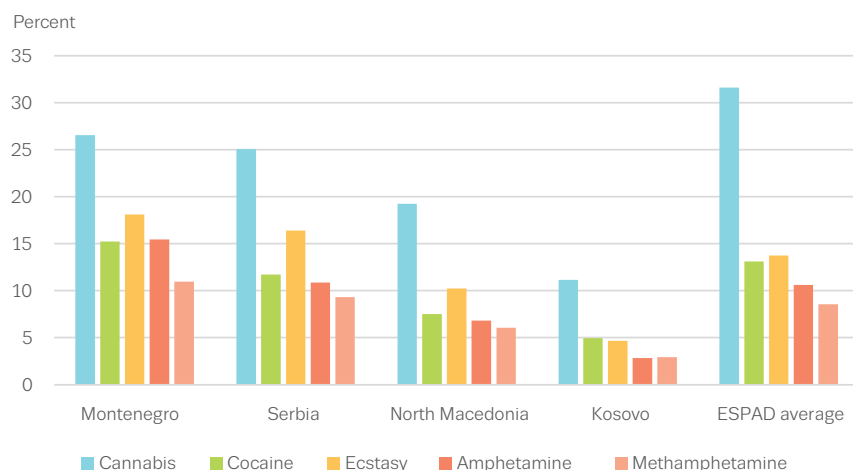
Each country in the region has some local or national estimate of populations presenting with high-risk patterns of drug use, such as opioid use and injecting. However, the data in many instances are now very old, and often important methodological and contextual information is not accessible. The information available in this area is thus difficult to evaluate or use as a basis for comparisons.

COVID-19 and the availability of drugs

Similar to findings from the EU, it appears that the impact of the COVID-19 pandemic on drug use and availability was most strongly associated with substances commonly purchased and used in nightlife settings, which were not accessible during periods of social distancing and lockdowns (EMCDDA, 2021b). Expert opinion suggested that the relative stability of parts of the drug market during the pandemic could be explained by the existence of short supply routes for cannabis and potentially large stocks of cocaine and heroin or uninterrupted supply chains. Online markets also appeared to become a more important source of supply during the COVID-19 pandemic, when restrictions on movement impeded people who use drugs from interacting with dealers in the usual way (EMCDDA, 2021a).

FIGURE 2

Perceived availability of drugs in ESPAD 2019: 15- to 16-year-old school students responding that the substance is 'fairly easy' or 'very easy' to obtain



Source: ESPAD, 2021.

Data on drug-related deaths are available for Albania, Kosovo, North Macedonia and Serbia. In all four, opioids are present in most recorded drug-related deaths, although in North Macedonia and Albania cocaine-related deaths are also proportionately relatively common among all substances in such recorded deaths. Opioids are often found in combination with other substances – typically, with alcohol, benzodiazepines or other opioids. However, caution is needed when interpreting these data as autopsy rates in the region are low, toxicological examinations may not always be conducted, and the data sources' coverage is often incomplete.

Countries in the region report relatively low rates of HIV among people who inject drugs, although the available data have limitations and are often old. Estimates of the prevalence of antibodies to hepatitis C virus (HCV) among people who inject drugs range from 24 % in Kosovo to 79 % in North Macedonia – levels that would be broadly comparable with those found in the EU (from 13 % to 86 % across the Member States in 2020) (EMCDDA, 2022).

Responses to drug use and harms

Prevention

Prevention is an explicit priority area in the national drug policy documents of all Western Balkan countries, where these exist. While national prevention systems vary, it is common to see a focus on the provision of prevention

initiatives in educational settings. Approaches used in these settings include skill development-oriented programmes with some evidence for effectiveness; awareness campaigns implemented by law enforcement organisations; and special lectures within subjects such as biology. Albania, Bosnia and Herzegovina, Montenegro and Serbia have at least one expert trained in the European Prevention Curriculum (EUPC), which provides guidance on those programmes that have been shown to be associated with positive outcomes. Bosnia and Herzegovina have translated the EUPC guidelines and begun training decision-makers across the country. Serbia now has a system of accreditation for prevention programmes and North Macedonia is planning to implement international guidelines in the coming years.

Harm reduction

National monitoring systems appear to be better equipped to monitor HIV than HCV infection, with diagnostic testing often routinely available for HIV infection, but not for HCV. In terms of treatment, direct acting antivirals, a highly effective treatment for HCV, are available in all countries of the region except North Macedonia, although restrictions or barriers to their use have been reported in Albania, Kosovo, Montenegro and Serbia (Maticic et al., 2020; WHO, 2019).

Harm reduction services are available in all countries of the region but levels of provision differ between countries.

Where services are available, they typically provide clean needles and syringes, counselling, testing for some infectious diseases, social support, and other health and support measures. With the exception of Serbia, where provision is managed by the public health institute, harm reduction provision is largely provided by non-governmental organisations. The extent, accessibility and geographical distribution of services vary between countries and appear largely dependent on the availability of budgetary resources. The provision of these services in the region has historically been fragile and dependent on the support of international donors. Recent changes in eligibility for and subsequent withdrawal of funding from Global Fund projects in some countries in the region seem to have made the situation of NGOs engaged in providing these services particularly precarious (EMCDDA, 2021b; Shaw, 2022). In North Macedonia and Serbia, national governments now co-fund harm reduction programmes from their state budgets.

A recent assessment of the situation suggests that harm reduction provision is insufficient to meet the probable levels of need in some countries, particularly in Albania and Bosnia and Herzegovina (Shaw, 2022). For example, the 2020 target of the World Health Organization (WHO) for syringe distribution was to ensure a coverage of 200 sterile syringes a year for each person who injects drugs (WHO, 2017). The estimated coverage of needle and syringe programmes ranges from 6 sterile syringes per year per person who inject drugs in Serbia to 74 in Montenegro (UNAIDS, 2022). While coverage in Bosnia and Herzegovina is estimated to have reached 142 syringes per person who inject drugs in 2016, this figure represents the situation prior to a substantial reduction in harm reduction provision and more recent data are unavailable (Shaw, 2022).

Treatment

Treatment modalities available in countries across the region typically include detoxification, in-patient hospital-based care and outpatient treatment. Opioid agonist treatment⁽⁴⁾ with methadone and buprenorphine is available in all countries. Estimates on opioid agonist treatment coverage are available for four countries in the region, and range from 11 % of people who use opioids in Albania and Bosnia and Herzegovina to 31 % in North Macedonia (UNAIDS, 2022). While these figures indicate

that coverage is below the recommended WHO 2020 target of 40 % (WHO, 2017), it is not clear how the coverage rates were calculated and caution should be exercised in relation to the reliability of the available estimates.

The existing information suggests that treatment provision is unevenly distributed geographically within the region, with the greatest coverage found in the main cities. In Albania, for example, clients have to travel to Tirana for any treatment other than methadone therapy. In North Macedonia, rural parts of the country have only limited access to opioid agonist treatment, although improvements were made during the COVID-19 pandemic.

While harm reduction programmes are provided predominantly by NGOs, drug treatment is mainly provided by public health institutions, although there are some exceptions to this. For instance, in Kosovo, the main drug treatment provider is the NGO Labyrinth, while in Albania, the NGO Aksion Plus is the sole provider of methadone treatment. The costs of drug treatment are typically covered by national health insurance schemes. Private treatment centres, therapeutic communities and programmes run by religious communities also exist, but currently these providers do not usually participate in national reporting and therefore information on the clients they see or the services they offer is limited.

Users of opioids represent the majority of clients seen by treatment centres in the region, although this may be largely determined by the fact that this is the main treatment on offer in centres that participate in reporting exercises. The numbers of clients entering treatment for other drugs are generally low, although some centres (for instance the Mother Theresa University Hospital in Tirana or Labyrinth in Kosovo) report substantial proportions of cocaine users among their clients. Experts reported a general lack of treatment options for non-opioid users, inadequate resources for psycho-social support and insufficient or non-existent programmes focused on social re-integration for those leaving care.

Interviews with practitioners noted that a number of more affluent people seeking drug treatment may pursue options in other countries, which may be related to issues around stigma or the services on offer locally.

⁽⁴⁾ 'Opioid agonist treatment' is used here as the preferred term to cover a range of treatments that involve the prescription of opioid agonists to treat opioid dependence. The reader should be aware this term includes opioid substitution treatment, which may still be used in some of the EMCDDA's data collection tools and historical documents.

The impact of drug markets in the Western Balkans

The region is an important area for international drug flows. Western Balkan criminal networks involved in drug trafficking activities have a significant impact on issues related to security, governance, the economy and the rule of law in the region, as well as contributing to criminality in EU countries where they have an operational presence.

Security

Drugs enter the Western Balkans by a number of different routes, each of which is associated with particular challenges to security and law enforcement. Cocaine and heroin, for example, are brought into the area through the Adriatic ports, which appear to have grown in importance for criminal networks, particularly those based in land-locked Western Balkan countries. This may also have had an impact on the security situation of cities close to these ports (e.g. the port of Durrës in Albania and the port of Bar in Montenegro), as a range of criminal activities take root in these locations to support the importation of drugs shipments, such as corrupt practices and dealings related to storage, transportation and money laundering.

An acute drug-related security threat in the Western Balkans is the violence associated with the competition for drug markets and trafficking routes, or which arises from

disputes between rival criminal networks (EMCDDA and Europol, 2022; Lala, 2021; OCCRP, 2020 – see also the box ‘[Linkages between football hooliganism and illicit activities](#)’).

There are also reports of members of international criminal networks operating in the Western Balkans or collaborating with crime networks based in the region. For example, members of Italian and Turkish criminal networks are reported to be evading justice by locating themselves in the Western Balkans, while Russian criminal organisations are thought to be involved in money laundering activities along the region’s coastline (Duvar, 2021; Jeremic et al., 2021; Kajosevic, 2021). There are also some reports of links with criminals and crime networks based in Latin America.

Governance and the rule of law

Criminal networks operating in places with weak governance along trafficking routes in the region are reported to have developed links with some local businesses and officials (GI-TOC, 2019). Where such alliances exist they present an ongoing threat to security and good governance (see the box ‘[Symbiosis between criminal networks and high-level corrupt practices](#)’).

Linkages between football hooliganism and illicit activities

In February 2021, the Serbian authorities arrested a leader of the Janjicari football hooligans group with links to a Montenegrin drug trafficking network, private security contractors and a number of senior officials (Dragojlo, 2021). A recent study of football hooliganism in the Western Balkans suggested that some groups in Serbia, and to a lesser extent in Bosnia and Herzegovina and North Macedonia, have been involved in the distribution and sale of drugs. These groups appear to exploit young members and encourage them to become involved in drug market activities. The same groups are also reported to have been used to cause disruption on behalf of some politicians and to be involved in weapons trafficking, burglaries and extortion (Djordjevic and Scaturro, 2022).

Symbiosis between criminal networks and high-level corrupt practices

In some places in the region, it is reported that a symbiotic relationship exists between criminal networks and high-level elites, resulting in corrupt practices. These can involve providing preferential access to public procurement contracts, which undermines the principle of a level playing field, deters potential investors and diverts public resources to criminal organisations, thereby hampering development (Zvekic and Roksandic, 2021). It has been reported that in some cases major drug traffickers may avoid prosecution, or, where successful convictions have taken place, verdicts have apparently been overturned (Zvekic and Roksandic, 2021).

There are also indications that profits derived from the drugs trade are being used to undermine the rule of law in the region (see also the box '[Laundering the proceeds from drug crimes](#)'). In some places this is reported to have created a cycle where drug money enables protection and protection enables and sustains the illicit activity. Criminal networks involved in the drugs trade are also reported to have threatened, bribed or blackmailed senior officials (Reitano and Amerhauser, 2020). In July 2021, in Albania, a prosecutor and two police officers were among 38 people detained for drug offences, corruption, abuse of position and money laundering in the context of a two-year international operation led by Italy (Euronews, 2021).

Socioeconomics and vulnerability

Certain places, located along trafficking routes in the region, that are characterised by socioeconomic vulnerability and weak governance appear to have become attractive targets for the activities of criminal networks. In these areas, young and unemployed people can be attracted by the prospect of making a substantial amount of money from involvement with the drugs trade, particularly where there is a lack of alternative employment opportunities. Thus, in some underdeveloped communities, these factors may have created a pool of young people who are vulnerable to participation in criminal networks, either at home or abroad.

In some rural communities, local economies also appear to have become dependent on the proceeds derived from cannabis cultivation. A major the crackdown on cannabis cultivation in Albania since 2016, may have contributed to an increase in migration to other parts of the country and abroad, exacerbated by a lack of alternative sources of income.

Laundering the proceeds from drug crimes

The proceeds of drug trafficking are reported to have been concealed and laundered in the Western Balkans through construction and real estate, gambling outlets and cash-intensive businesses. Property-based money laundering, potentially using proceeds derived from the drugs trade, may have contributed to an increase in real estate prices in a number of areas, such as Belgrade, Tirana and along the Adriatic coast, although the magnitude of this increase is difficult to assess. Many buildings are reported to remain empty after completion, potentially indicating money laundering. In Montenegro, the Kavač and Škaljari criminal networks have been alleged to own property worth more than EUR 27 million (CDM, 2017).

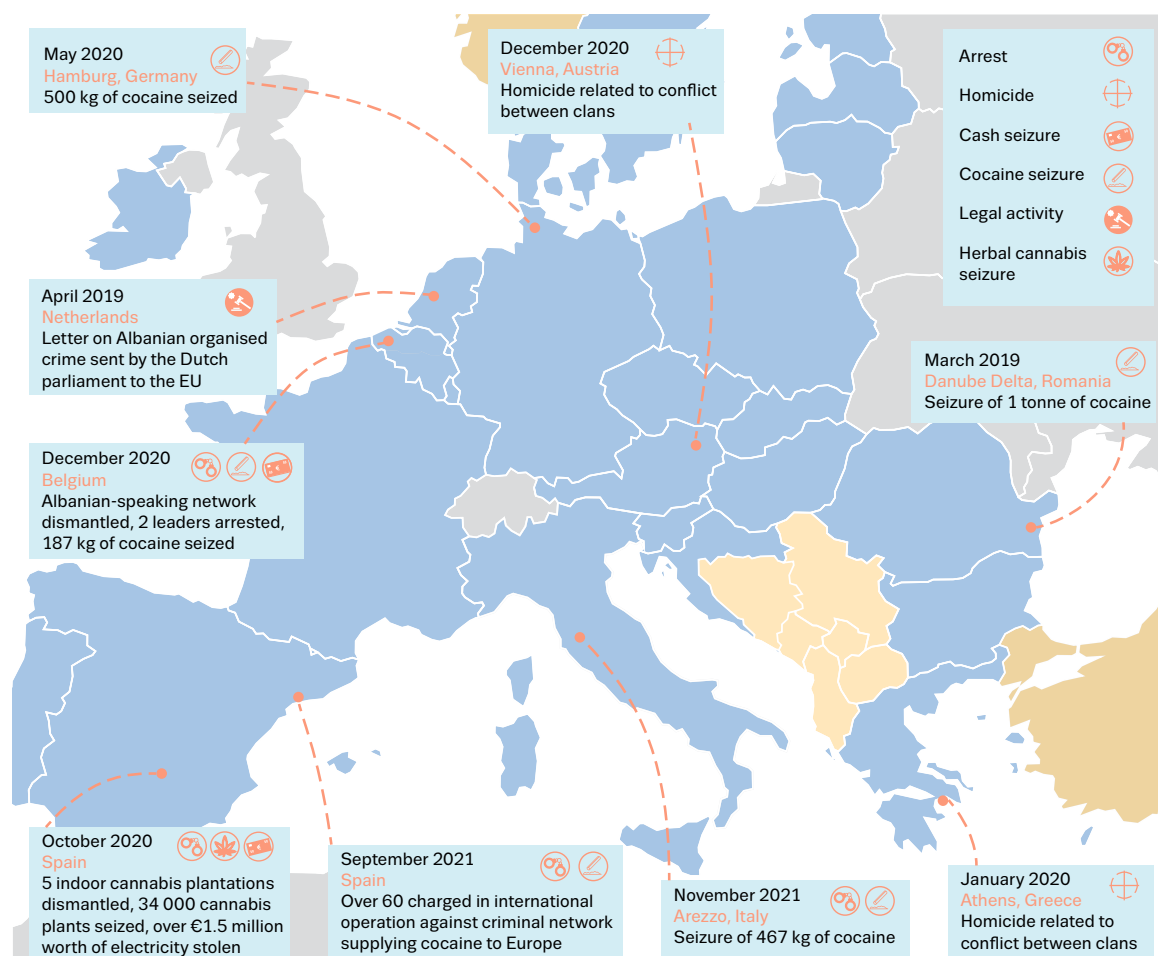
The role and impact of Western Balkan criminal networks on drug markets in the EU

Criminal networks from the Western Balkans are also active in the EU, which represents a lucrative drugs market in close geographical proximity (Figure 3). Their activities in the EU appear to have been also aided by the presence of sizeable diasporas from the region, providing a pool of individuals who can be exploited or recruited into their networks.

Criminal networks from the Western Balkans appear to have become active in the EU in the 1990s, due to war and instability in the region. It appears that criminals from the

Western Balkans have tended to gravitate to places where there is a sizeable diaspora; for example, the North Macedonian criminal network known as the 'Frankfurt mafia' was reported to be involved in the trafficking of heroin from the Western Balkans to Frankfurt and Vienna (Kemp, 2020a; Marusic, 2013). The presence in Slovakia of criminals from Albania and the former Yugoslavia was also reported (Holcová et al., 2019), while members of the network known as the 'Yugomafia' acted as enforcers and drug traffickers in the Netherlands and Sweden (GI-TOC, 2020; Kemp, 2020a). These networks were also reported

FIGURE 3
Selected drug trafficking events in EU countries related to Western Balkans organised criminal networks



Sources: EMCDDA and GI-TOC.

to be involved in other non-drug-related illicit activities, such as weapons and cigarette smuggling in Italy in the 1990s, but have expanded their activities into other areas over the last three decades. Interviews with experts and other sources indicate that these networks are now key players in EU drug markets, having expanded their portfolio from heroin and cannabis to include cocaine and, to a lesser extent, synthetic drugs (Kemp, 2020a).

The current situation is that a range of sources point to criminal networks from Bosnia and Herzegovina, Montenegro and Serbia being involved in a broad range of criminal activities, including the theft of cars and other luxury goods, while groups from Albania are reported to have developed a reputation for robbing luxury property and cars in Western Europe (GI-TOC, 2021a). There are also indications that Albanian criminal networks have recently been involved in large-scale drug trafficking, including reports that they have close collaborative links with the Italian 'Ndrangheta. In November 2021, an Albanian was arrested in Italy after 467 kilograms of cocaine was found in the truck he was driving (Lider, 2021).

Cocaine trafficking: a game-changer for Western Balkan criminal networks

Involvement in cocaine trafficking appears to have been a game-changer for Western Balkan networks, leading to their emergence as key players in the EU drugs market. These groups have gradually increased their involvement in the cocaine trade and there is now evidence that they are orchestrating trafficking operations from Latin America directly to European ports (EMCDDA and Europol, 2022). Some of these networks have also become prominent actors in retail distribution in the EU (see also the section '[Cocaine: use and supply](#)').

While their involvement in the cocaine trade seems to have grown recently, for more than a decade Western Balkan criminal networks appear to have had an operational presence in Belgium and the Netherlands, which they have used as drug importation and distribution hubs – particularly for cocaine. The choice of these two countries is probably due to the central role that the ports of Antwerp and Rotterdam now play in importing drugs into the EU. In December 2020, two leading figures from an Albanian network were arrested in Belgium for their role in bringing cocaine into Europe from South America (News24, 2020); in another case, in 2018, two Serbian citizens were arrested in the Netherlands and Belgium, together with EUR 1.7 million of suspected proceeds from

drug trafficking (Pavlovic, 2018). In April 2019, the Dutch government asked the EU to suspend visa-free travel for Albanians, citing the growing threat from Western Balkan criminal networks and their significant role in the supply of cocaine, money laundering and trafficking in human beings (Schengenvisa News, 2019; Todd, 2019).

While Belgium and the Netherlands appear to be central to the operations of these criminal networks, the Western Balkan groups now also seem to be important actors in the cocaine, heroin and cannabis markets of other countries in Europe, such as Germany, Italy, Spain, Switzerland (Swissinfo.ch, 2019a, 2019b) and the United Kingdom. For example, the Škaljari and Kavač clans from Montenegro appear to have been active in cocaine trafficking through Spain since at least 2014 when, according to Kemp (2020b), a drug shipment that went missing in Valencia resulted in violence between the two criminal networks. German authorities have also indicated that there is a link between Western Balkan criminal networks and the increase in cocaine seizures noted in the German port of Hamburg (BKA, 2021).

There is some evidence that Western Balkan criminal groups continued trafficking cocaine to EU ports at the beginning of the COVID-19 pandemic. For example, in early May 2020, 500 kilograms of cocaine was seized on a Montenegro-registered vessel that had sailed from Brazil via the United Kingdom to the port of Hamburg (EMCDDA, 2021a; Hakirevic, 2020).

Evolution in the involvement of criminal networks in cannabis production

Criminal networks from the Western Balkans are reported to have also increased their involvement in cannabis production in the EU over the last 6 years, specifically in relation to intensive indoor cultivation. An example of this can be seen in Spain, where, in October 2016, 19 suspects of mostly Serbian origin were arrested and 6 indoor cannabis cultivation sites were dismantled along with the confiscation of EUR 50 690 (Europol, 2016). It is speculated that measures to reduce outdoor cannabis cultivation in Albania have resulted in criminal networks reorienting their activities to indoor intensive cultivation sites and, over time, extending these to other locations closer to the large consumer markets in the EU (Mejdini, 2021). This development is reflected in a number of recent international joint investigations conducted in the EU against Western Balkan criminal networks, mainly Albanian-speaking and Serbian groups (see also the section '[Cannabis: use, production and supply](#)').

A reputation for violence

It can be argued that part of the reason why criminal networks from the Western Balkans have become firmly established in international drug trafficking activities, both in competition and cooperation with other actors, is their use of violence (see also Figure 3). These groups appear particularly prepared to use violence as a strategic tool to assert their authority over other groups or individuals involved in the drug market (Kemp, 2020b).

For instance, there have been a number of shootings in Albania linked to competition over drug distribution or to disputes between criminal networks that sometimes have their origins in conflicts related to drug market activities conducted in EU countries or elsewhere (EMCDDA and Europol, 2022; Lala, 2021; OCCRP, 2020). An example of the propensity of some Western Balkan criminal networks to use violence can be seen in recent investigations into the Sky ECC encrypted communications platform, which revealed acts of torture that appear to have taken place in 2020 in Belgrade (Piel and Saintourens, 2022).

A number of homicides linked to the cocaine trade and Western Balkan criminal networks have also been reported in recent years in the EU. The widespread involvement of these groups in the European cocaine market is indicated by the fact that homicides have been noted in cities including Vienna (Amerhauser, 2019), Amsterdam (Avdić, 2019), Athens (Kajosevic, 2020), Rome (De Risi, 2020), Málaga and Berlin (Kemp, 2020b). In addition, between 2018 and 2020 there were at least nine murders and two attempted homicides in South Africa (around Johannesburg), involving Serbians with backgrounds in criminal networks or paramilitary organisations (Kemp, 2020a).

Much of this violence appear to take place between groups involved in criminal activities. It appears that within the EU Western Balkan criminal networks attempt to keep a low profile and try to avoid attracting attention to their activities through publicly reported violent acts. Nonetheless, they appear to maintain a considerable capacity in this area and have been reported to have access to a wide arsenal of weapons, ranging from pistols and automatic rifles to sniper rifles and remote-controlled bombs (OCCRP, 2020; Politiko, 2022a).

Using EU countries for transit and hiding

Some EU countries are located on trafficking routes that pass through the Western Balkans before re-entering the

EU. This means that trafficking flows can be complex. For example, major trafficking routes for heroin and cocaine have become established through Bulgaria, Croatia, Greece and Romania, with the drugs entering the Western Balkans for local distribution but also for transshipment to other countries – including to countries in the EU.

While criminal networks from the Western Balkans appear to be principally involved in the importation of cocaine through major EU ports, a rise has been reported in cocaine trafficking through ports in Albania and Montenegro, as well as some other EU countries, such as Romania (Rudic, 2019). This suggests that these networks have diversified their tactics for moving drugs into the EU market, which could represent an important threat in the future, especially in the context of the greater investment being made in interdiction measures at the known major entry ports for drug trafficking to the EU.

EU countries also play another important role for Western Balkan criminal networks, notably as places for criminals to hide, either from the reach of law enforcement or from the attention of other criminal groups with whom they have disputes. For example, anecdotal information suggests that spa towns in EU countries geographically close to the Western Balkans have become popular destinations for criminals from the region to rest and recover.

Drug trafficking, particularly to or within the EU, by criminals from the Western Balkans, is also enabled by the use of fake or stolen identification documents. As stated by an officer from the Spanish Guardia Civil, 'One of the big difficulties in tracking down fugitives from countries from the former Yugoslavia is precisely the ease with which they can get hold of fake documents' (Ortega Dolz, 2020). It appears that, together with drugs, forged identity documents, weapons and cash are often seized from Western Balkan criminal networks (Europol, 2020c; Nova, 2021).

Wider criminal activities

In addition to involvement in the drug market, criminal networks from the Western Balkans are at times also known to be involved in other criminal activities, which may include the supply of weapons, human trafficking and money laundering. These topics are reviewed briefly below.

The smuggling of weapons

Europol notes that the criminal networks involved in weapons trafficking in the EU primarily originate from the

Western Balkans ⁽⁵⁾. These weapons will typically have been held illegally after recent conflicts in the area or were appropriated after the fall of the Soviet Union. Information gleaned from interviews with experts in this area suggests that none of these networks appear to be exclusively involved in the supply of weapons; rather, they are involved in a number of illicit activities, such as drug trafficking, and will engage in arms dealing on occasion. The diversity of weapons available to Western Balkan groups and that could potentially be smuggled into the EU can be illustrated by reports from the Swedish police which indicate that pistols, automatic weapons and even grenades have been smuggled from the Western Balkans and have been used in gang violence (GI-TOC, 2020). Weapons from the Western Balkans have also been linked to violent extremists, terrorists and paramilitaries. For example, the 2015 attacks in Paris, France, appear to have been carried out with weapons sourced from the Western Balkans (The Economist, 2016). Weapons may also be smuggled into the Western Balkans along with shipments of drugs, as evidenced when both are seized during the same operation (Ministry of Interior of North Macedonia, 2017; Zorić, 2020). There are also indications that heroin and weapons have been smuggled together from Türkiye into Kosovo.

The money generated by drug trafficking groups in Western Europe and laundered in the Western Balkans is often smuggled across borders in hidden compartments of cars and trucks. According to a report which interviewed truck drivers, cash couriers travel regularly between Albania and EU countries, as well as the United Kingdom, carrying relatively small sums (less than EUR 10 000) to avoid suspicion (Reitano and Amerhauser, 2020). Illicit proceeds of crime are also transferred via the financial system, fast-money transfer companies and hawala operators (Cartwright and Amerhauser, 2022; Europol, 2020b; Reitano and Amerhauser, 2020). In addition, experts have noted the role that cryptocurrencies may play in transferring funds from the drugs trade into and out of the Western Balkans (GI-TOC, 2021c).

Illegal migration and human trafficking

While migrant smuggling routes overlap with those used to move drugs across the Western Balkans, there is only limited evidence that the groups engaged in human trafficking or migrant smuggling are also involved in drug trafficking (Kemp et al., 2021). However, in relation to the links between drugs and illegal migration, there have been a number of reports of migrants carrying drugs to pay for smuggling services or for their own consumption (Direktno, 2020; Jutarnji, 2016; Mondo, 2020). Furthermore, members of a Western Balkans network involved in cannabis cultivation in the EU are believed to have had links to people trafficking, prostitution and money laundering (Europol, 2021a).

Money laundering

Criminal networks from the Western Balkans are also known to launder the proceeds of drug trafficking in the EU as well as in the Western Balkans and offshore locations, such as the United Arab Emirates (Kemp, 2020a; Rettman, 2021).

⁽⁵⁾ For further information, see <https://www.europol.europa.eu/crime-areas-and-statistics/crime-areas/illicit-firearms-trafficking>.

Cannabis: use, production and supply

While the available evidence suggests that cannabis is the most commonly used drug in the region, robust data to allow comment on trends and overall prevalence levels is largely lacking. Some qualitative indications of increased use, especially among youth, exist and more treatment demand and the need for specific treatment for cannabis have been noted by some observers.

Since 2016, seizures would suggest that cannabis cultivation methods appear to have changed in the Western Balkans, with less outdoor cannabis production identified. This seems to have been influenced by major eradication efforts in Albania. However, the situation has become more diverse and complex, with more countries in the region recording large-scale indoor cannabis cultivation sites. In addition, some legally produced cannabis appears to have ended up on the illicit market. A number of criminal networks from the region also seem to be increasingly involved in cannabis cultivation in the EU.

Cannabis is the most consumed drug

Cannabis is the most commonly used illicit drug in the Western Balkan region. Among young adults aged 15-34, estimates of annual prevalence range between 1.9 % for Bosnia and Herzegovina (2018) to 12.5 % in North Macedonia (2017). This is lower than the estimated EU average of 15.5 % of young adults for 2020. As noted earlier, under-reporting may be an issue for surveys conducted in the region.

Herbal cannabis is the most common form of cannabis used in the region. This is indicated by results from the 2021 European Web Survey on Drugs (EWSD), conducted in 5 countries in the region, showing that an average of 87 % of those that used cannabis in the last 12 months reported the use of herbal cannabis, while 24 % reported the use of cannabis resin. Among these respondents, the highest levels of reported use of cannabis resin were found in Albania (54 %) and Kosovo (34 %), while the lowest were observed in Serbia (7 %) and Montenegro (9 %). Cannabis oil or extract was most popular in North Macedonia (27 %), while in other countries it was reported by 10 % or less of cannabis users. In the same study, the use of medically prescribed cannabis was reported by between 1 % and 2 % of cannabis users, while the figures for those using some form of legal cannabis products branded as CBD or low-THC ranged between 15 % in Albania and 40 % in North Macedonia. Importantly, the results of the EWSD are

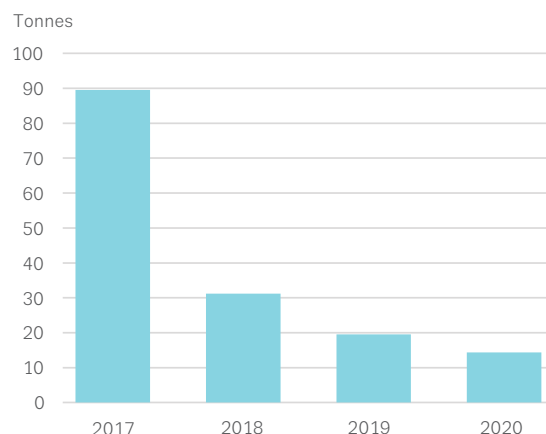
not generalised to any larger populations or groups as this study used a self-nominated non-random sample. Thus, while these results can provide some indications of what drugs are used by people participating in the survey, they cannot be treated as representative estimates.

Very few people in the region enter specialised treatment for cannabis-related problems, according to the preliminary data on treatment access currently available. A possible exception is Albania, where about a tenth of annual treatment entrants report cannabis as their main problem drug. Interviews with practitioners in both Albania and Serbia revealed their impression that the number of younger people who were seeking help, or experiencing problems related to their cannabis use was increasing. The overall low numbers of clients entering treatment for cannabis-related problems in the region need to be interpreted within the overall context of the limited availability of drug treatment services and, in particular, the low availability of services for those with cannabis-related problems.

Regional herbal cannabis seizures

The period 2017-2020 was characterised by a decreasing trend in the quantities of herbal cannabis seized in the region (see Figure 4). While more than 84 tonnes was

FIGURE 4
Total herbal cannabis seized in Western Balkans, 2017-2020



Source: EMCDDA.

seized at the regional level in 2017, mostly in Albania, the amount decreased significantly to about 19.5 tonnes in 2019 and 14 tonnes in 2020.

Diversification in cannabis cultivation practices

Cannabis appears to be cultivated both indoors and outdoors throughout the Western Balkans. Experts have noted that, when cultivating cannabis outside, some Albanian criminals now appear to be making use of cannabis seeds imported from the Netherlands, which have a shorter growing cycle (Brnad, 2022).

Since around 2016 there has been an increased investment in cannabis eradication in Albania and this appears to have reduced the large-scale outdoor cultivation of this drug. These eradication efforts have been undertaken in cooperation with the Italian Guardia di Finanza, and have included aerial surveillance to locate cannabis cultivation sites in more remote and difficult-to-access areas. As a result of these efforts, Albania seems to now play a smaller role in regional cannabis production than it has in the past. However, an important caveat here is that both in Albania and other countries in the region intensive indoor cannabis cultivation appears to have become more common (Brnad, 2022; Sinoruka, 2022).

Industrial-scale indoor and outdoor cannabis cultivation facilities have recently been identified in several countries in the region. Facilities with over 10 000 plants were reported to have been dismantled in Serbia in November 2019 (see the box '[Indoor industrial-scale cannabis plantation in Serbia](#)'), in Kosovo in May 2022 (RTKLIVE, 2022a) and in North Macedonia in June 2022 (Ministry of Interior of North Macedonia, 2022). Considering the large scale of these sites, it seems likely that some of the cannabis being produced was intended for export. In addition, authorities in Montenegro dismantled the country's first large indoor cannabis cultivation site in 2021 (Brnad, 2022).

Possible diversion of legal cannabis to the illicit market

Cannabis production for medicinal use was legalised in North Macedonia in 2016. Between February 2017 and October 2021, 64 companies were reported to have been granted licences to grow cannabis (Hall, 2021).

Indoor industrial-scale cannabis plantation in Serbia

In November 2019, Serbian police dismantled an industrial-scale indoor cannabis production site that was concealed inside an organic vegetable farm. During the operation, nearly 4 tonnes of cannabis products was seized, including 650 kilograms of herbal cannabis. In addition, a fake police ID card and a car with police markings were found. The cultivation site was protected by technical equipment to interfere with phone signals, armed guards with anti-drone rifles and thermal cameras for night-time surveillance.

Sources: Reuters, 2019; Zorić, 2020.

There are recent indications that some legally produced cannabis may have been diverted into the illicit drug market in North Macedonia or smuggled into other countries. For example, there were two cases that involved over 2 tonnes of cannabis being stolen from the warehouses of licensed North Macedonian companies in 2020 (Ministry of Interior of North Macedonia, 2020a, 2020b). There are also indications that illicit cannabis production may have been deliberately undertaken in licensed production facilities. For example, in February 2022, police seized about 1.5 tonnes of undeclared cannabis from one of the legally registered growers (Trkanjec, 2022). In June 2022, the Albanian government published, for consultation, a law regulating cannabis cultivation for medical and industrial purposes (Electronic Register Albania, 2022). Given the current scale and potential growth of legal cannabis production within this region, an important consideration for the future will be how to ensure that production sites are not infiltrated by criminal networks and robust measures are put in place to prevent legally produced cannabis from entering the illicit market.

Cannabis cultivation expertise and operations moving to the EU

Western Balkan criminal networks appear to be involved in both trafficking cannabis into the EU from countries outside the EU, including the Western Balkans, and cultivating cannabis inside the EU (Bureau for Operational Coordination, 2021; Europol, 2021e).

Industrial-scale cannabis cultivation in Spain results in an estimated EUR 1.5 million worth of stolen electricity

In an international joint investigation, Spain, with the support of Europol, Belgium and the Netherlands, broke up a criminal network involved in cannabis cultivation and consisting essentially of Albanian nationals. In a series of coordinated raids, five indoor cannabis plantations were dismantled and more than 34 000 cannabis plants were seized in October 2020. The criminals were diverting the local electricity and water supply, with an estimated EUR 1.5 million worth of electricity stolen to power the plantations.

The indoor plantations produced three to four cannabis crops per year and were located in quiet areas in the suburbs of Barcelona. The herbal cannabis was shipped in pallets on lorries to the Netherlands. The criminal network made use of encrypted communication technologies to facilitate their business.

Source: Europol, 2020c.

Over the last 6 years, criminal networks based in the Western Balkans appear to have become increasingly involved in indoor cannabis cultivation in EU countries (e.g. Austria, Belgium, France, Germany, Greece, Italy, Netherlands, Spain – Europol, 2019, 2020a, 2020c, 2021a, 2021c, 2021d; Ministry of Interior of Austria, 2021; Newsit, 2020) (see also the section [‘The role and impact of Western Balkan criminal networks on drug markets in the EU’](#)). A possible driver of this development is the reduction of risks and costs that come from locating drug production sites close to their intended consumer market (Brnad, 2022).

Several international joint investigations have been carried out in the EU against mainly Albanian-speaking and Serbian criminal networks involved in cannabis production (see the box [‘Industrial-scale cannabis cultivation in Spain...’](#)). Based on the available information, Spain appears to be most common location for the establishment of cannabis cultivation sites. In September 2021, more than 100 suspects, mainly Albanian-speaking, were arrested for managing 51 cannabis plantations in Spain (Europol, 2021c). Other countries have also been affected however, such as Belgium and France, where the police arrested more than 60 members of an Albanian-speaking organised crime network who were linked to at least a dozen indoor cannabis cultivation sites in April 2019 (Europol, 2021a).

In September 2020, a Serbian woman accused of heading an international cannabis trafficking network, composed of Serbian, Bosnian, Croatian and Spanish nationals, was arrested after 12 600 plants and 190 kilograms of processed cannabis were seized in Spain (ARVBL, 2020). In other law enforcement operations, in January and June 2021, over 40 members of a Serbian criminal network were targeted for their involvement in producing and distributing

herbal cannabis and cannabis resin in Spain (Europol, 2021d).

Herbal cannabis trafficking

The Western Balkans is a source of herbal cannabis trafficked into the EU. Trafficking also takes place between countries in the region and into Türkiye (see the box [‘Cannabis trafficking in the ‘opposite’ direction of the Balkan route’](#)). Prior to 2018, Albania was considered a major non-EU source of herbal cannabis destined for the European market (EMCDDA and Europol, 2019), a perception confirmed by seizures made in the Western Balkans and EU countries. Although cannabis trafficking routes to the EU and neighbouring countries still remain active (Brnad, 2022), from around 2018 neighbouring

Cannabis trafficking in the ‘opposite’ direction of the Balkan route

Türkiye remains a key destination for herbal cannabis from the Western Balkans, and there are indications that cannabis may sometimes be exchanged for heroin (Brnad, 2022; Mejdini and Amerhauser, 2019; Sinoruka, 2022) or even cocaine (US Department of State, 2022). This is thought to be a sign that drug shipments along the Balkan route may be becoming more bi-directional. For example, cannabis products are now being transported in the ‘opposite direction’ to the normal drug flows, but potentially using the same networks, criminal infrastructure and methods used to traffic heroin into the EU.

countries, such as Greece, Italy and North Macedonia, have reported a substantial decrease in the seizure of cannabis of Albanian origin (UNODC, 2020). Some information exists to suggest that from this period there may also have been an increase in production in other Western Balkan countries. Overall, however, Albania currently does not appear to be as important a source of herbal cannabis for the EU market as it was prior to 2018.

Seizures would suggest that herbal cannabis originating in the Western Balkans and trafficked to the EU is usually transported across land borders, for example to Hungary (Ljubas, 2020; Reitox National Focal Point of Hungary, 2020) and Croatia (Ministry of Interior of Croatia, 2019) (see also the map of Western Balkans main drug trafficking routes shown in Figure 1, page 7). It is also sometimes trafficked by sea, to Greece, Italy and Türkiye (Daily Sabah, 2021). Despite any possible reductions in production, the region still appears to be an important source of cannabis for some EU countries. For example, around 48 % of cannabis seized in Greece in 2020 was thought to be of Albanian origin, although this does represent a decrease compared to previous years (e.g. 62 % in 2018 and 71 % in 2017) (Brnad, 2022; Hellenic Police, 2020). Similarly, the overall amount of herbal cannabis trafficked to Italy appears to have reduced in recent years, as indicated by the steady decline in seizures, with less herbal cannabis being intercepted while being transported by speedboats across the Adriatic Sea (Halili, 2021a; Ministry of Interior of Italy, 2021). Nevertheless, it appears that this route is still active, as shown by a recent seizure of 992 kilograms of herbal cannabis in the Adriatic Sea, transported by sailboat and speedboats in August 2022, with three Albanian and two Ukrainian suspects arrested (Velaj, 2022).

Some cannabis trafficking is thought to be carried out by small aircraft (Brnad, 2022; City News Albania, 2021; Ljubas, 2020), or even on occasion by unmanned aerial devices (drones) (Vijesti, 2022). However, these modes of transport are likely to be the exception rather than the rule.

The complexity of cannabis trafficking flows is highlighted by cannabis products being trafficked from the EU to the Western Balkans. For example, there are indications that cannabis seedlings from the EU may have been transported to the Western Balkans for cultivation. In January 2022, Croatian police seized 1 096 cannabis seedlings at the border with Montenegro from a truck destined for North Macedonia (Brnad, 2022; Ministry of Interior of Croatia, 2022). In June 2022, Spanish police dismantled an organised criminal network cultivating cannabis destined for many European drug markets, including the Serbian market (Spanish News Today, 2022).

Cannabis resin and other products: production and trafficking

Although the volumes of cannabis resin involved appear very low when compared with herbal cannabis, small seizures of the drug indicate that the Western Balkans is also a transshipment point for cannabis resin and possibly a producer. The amount of cannabis resin seized in Albania increased from 23 kilograms in 2016 to 1.1 tonnes in 2019, before dropping sharply to 1 kilogram in 2020. However, the available information does not allow any conclusions to be drawn on the origin of cannabis resin seized in the Western Balkans.

There are also some indications that cannabis oil is produced in the region. In 2017 for example, Montenegro seized 17 litres of cannabis oil, suspected of originating in Albania, in transit towards the EU (EMCDDA and Europol, 2019).

Evidence also exists for different types of cannabis products being trafficked from the Western Balkans at the same time. For example, in February 2020 Italian authorities seized 450 kilograms of herbal cannabis, 75 kilograms of cannabis resin and 3.5 litres of cannabis oil in the same shipment from Albania, while in April 2020 they arrested two Italian nationals for smuggling 646 kilograms of herbal cannabis and 250 kilograms of cannabis resin, also from Albania (Guardia di Finanza, 2020; Kote, 2020).

Cannabis prices

A caveat should be raised before commenting on cannabis prices ⁽⁹⁾, in that the data available are not complete. While this introduces a degree of uncertainty, it is nonetheless possible to make some observations on this topic. Based on the available data, the mean retail price of herbal cannabis in the region between 2018 and 2020 was around 6 EUR per gram, with Albania having the lowest average price (EUR 4/g) and Serbia the highest (EUR 7.4/g). Although the price of herbal cannabis is conventionally reported in EUR per gram at the retail level and EUR per kilogram at the wholesale level, data collected in the field in the period 2019-2020 provide some interesting details about the size of transactions. For instance, the information available suggests that users may buy herbal cannabis in quantities ranging from 0.8 to

⁽⁹⁾ Drug prices were analysed by GI-TOC based on data provided by countries in the Western Balkans to the EMCDDA and data collected by GI-TOC (Kemp et al., 2021).

1.2 grams for a minimum of EUR 4 in Albania – where it is also possible to buy 10 grams at a discounted price of around EUR 30 (Kemp et al., 2021).

The available information would also suggest that between 2018 and 2020 the mean price of wholesale herbal cannabis in the region was around EUR 1 600 per kilogram with Albania having the lowest average price (EUR 1 300/kg) and Serbia the highest (EUR 2 300/kg). At the wholesale level, the price of 1 kilogram of herbal cannabis appears to vary significantly depending on how it is produced. In Albania, for example, cannabis cultivated outdoors has been sold for between EUR 1 200 and EUR 1 800 per kilogram, while cannabis cultivated indoors has been sold for up to EUR 2 400 per kilogram. It might be expected that intensive indoor cultivation could potentially result in herbal cannabis with a higher potency compared with outdoor cultivation, although there is no forensic information available to confirm this. In Serbia, however, 'high-quality' indoor cultivated cannabis is reported to sell for up to EUR 4 000 per kilogram.

Once the cannabis is trafficked across international borders there is thought to be an additional mark-up of around EUR 200 per kilogram, although this is likely to vary depending on how many borders were crossed, the level of risk involved and the means of transportation employed. In the example of trafficking using speedboats (to countries such as Italy or Greece), it has been reported that the mark-up may reach up to EUR 700 per kilogram (Kemp et al., 2021). Expert opinion suggests that the price of cannabis products appears to have increased in the last few years as a result of law enforcement activities, such as seizures of large cultivation sites, that have reduced supply (Brnad, 2022).

Cocaine: use and supply

The use of powder cocaine, its injecting and the use of crack cocaine, have all been reported to be increasing in the region. Experts believe that cocaine use appears to have now become established in the region, and deaths related to cocaine have been reported by some countries in the Western Balkans. A caveat here, as noted earlier, is that robust empirical data which would permit commenting with confidence on drug use trends and prevalence levels are largely lacking.

Recent seizures suggest that cocaine trafficking through seaports in the Western Balkans, particularly in Albania and Montenegro, may have increased: even though the quantities in question are still very small in comparison to the amounts seized at major EU entry ports for this drug. Information from law enforcement sources also suggests that criminal networks from the region appear to have become major players in the EU cocaine market. Sometimes this involves orchestrating operations across the entire supply chain, from sourcing the drug in Latin America and importing it directly into EU and Western Balkan ports, to distributing it on the streets of European countries.

Diversity in patterns of cocaine use by the affluent and the marginalised

Cocaine is the second most commonly reported illicit drug in the Western Balkans, after cannabis, based on the available general population survey data, although more stigmatised forms and substances of use, such as related to opioids, may be underestimated in these data. Patterns of cocaine use can range from use in recreational settings among more affluent consumers to high-risk use among marginalised populations. Last year prevalence estimates of cocaine use among young adults exist for some countries, but the available data are now very old and it is not known how much they reflect the current situation. For example, in Albania an estimate for 2014 of last year prevalence suggested that 3.6 % of young adults had ever tried the drug. In Montenegro this figure was similar (3.7 %) in 2017. As a point of comparison, the EU average for this measure in 2020 was 2.2 %, although large differences were observed between countries (EMCDDA, 2022). In the 2019 ESPAD study, cocaine and crack cocaine use in Montenegro were reported as relatively high among 15- to 16-year-old students, at 2.9 % and 1.4 % respectively (compared with 1.9 % and 1.1 % average prevalence of lifetime cocaine and crack use across all ESPAD-

participating countries in 2019) (ESPAD, 2021). There is an impression among experts that the use and number of users of cocaine has recently increased among the middle class in upwardly mobile and more affluent urban areas in Belgrade, Podgorica and Tirana and at holiday resorts in the region (such as those on the Adriatic coast or ski resorts like Jahorina in Bosnia and Herzegovina).

Cocaine use was also relatively high among respondents to the EWSD 2021. Among those reporting the use of cocaine, cocaine powder was the most common form used (at an average of 94 % across five countries) while the use of crack cocaine was far less commonly reported (6 %), although this figure was higher in Albania (19 %). However, the Albanian survey for this exercise appears to have reached clients of low-threshold programmes, and therefore the differences observed may simply reflect sampling differences rather than necessarily any overall differences in patterns of use. As noted earlier, the EWSD is a self-nominated online exercise and therefore the results are not generalisable to the population as a whole.

The injecting of cocaine has also been reported sporadically in North Macedonia and more recently in Montenegro, where cocaine is reported to be injected either on its own or in combination with opioids (EMCDDA, 2021b). Cocaine-related deaths have also been reported in Albania and North Macedonia.

Very few people enter treatment for cocaine-related problems in the region. The notable exception is Albania, where cocaine clients represented between a third and a half of all clients entering treatment in the Mother Theresa University Hospital in Tirana between 2019 and 2020. Experts have noted that, in the region as a whole, services for those with stimulant-related problems are underdeveloped or non-existent. The social stigma associated with having a drug problem was also reported to present a barrier to help-seeking or lead more affluent individuals to seek treatment abroad.

Increasing role of Western Balkans ports

Cocaine availability in the EU is at an all-time high, with record quantities having been seized in Europe every year since 2017. Although there have been some large seizures of the drug in the Western Balkan region in the past, the data continue to suggest that, overall, cocaine smuggling in the region is very limited in scale when compared to key

EU countries (EMCDDA and Europol, 2022). That said, however, there are currently some indications that the role of Western Balkan criminal networks and ports in Europe's cocaine trade may be increasing, and this could potentially represent a threat for the future.

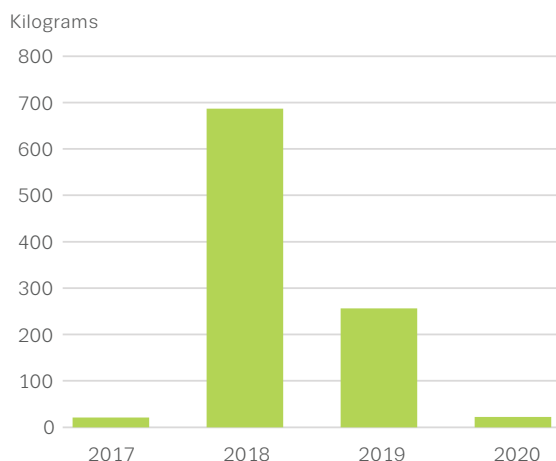
Interpreting the data on cocaine seizures in the Western Balkan is quite challenging, but the most recent developments in this area are worrying. A review of the data on recorded cocaine seizures in the region between 2017 and 2020 shows a dramatic rise (see Figure 5), to nearly 700 kilograms in 2018. As a point of comparison, this represents less than 1 % of the cocaine seized in the EU in the same year, but this volume of seizures is still exceptional for the region by historical standards. However, the 2018 values principally reflect one large seizure of 613 kilograms of cocaine made by the Albanian authorities (Exit News, 2018). In contrast, the volumes of cocaine reported as seized in the years 2017 and 2020 were both minimal, with a sharp fall in the amounts seized between 2018 and 2019.

More recently, however, the preliminary data available on seizures in 2021 and 2022 indicate that the role played by seaports in the Western Balkan region, particularly in Albania and Montenegro, may be growing. For example, media reports indicate that in the port of Durrës, Albania, 143 kilograms of cocaine was seized in April 2021 (Exit News, 2021) and 119 kilograms in December 2021 (Java News, 2022). Similarly, in the port of Bar, Montenegro, 1.4 tonnes was seized in August 2021 and a seizure of 500 kilograms was reported in January 2022 (Kajosevic, 2022). In addition, Kosovo seized a shipment of 400 kilograms of cocaine in May 2021, after it had been smuggled through the Albanian port of Durrës (Halili, 2021b). It is also likely that cocaine seizures only reflect a small share of the total volumes of cocaine trafficked through the region. For example, Montenegrin authorities suspect that over 3 tonnes of cocaine was smuggled through the port of Bar in the second half of 2021 (Kajosevic, 2022).

Key role in global cocaine trafficking

As noted already, criminal networks from the Western Balkan region have emerged in recent years as important players in the EU cocaine market (see the section '[The role and impact of Western Balkan criminal networks on drug markets in the EU](#)'). They appear to be present in key locations in South America, such as Ecuador (Cela and Moran, 2019; Euronews, 2022; Ford, 2021), Colombia (Análisis Urbano, 2018; Infobae, 2021; Parkinson, 2020),

FIGURE 5
Cocaine seized in Western Balkans, 2017-2020



Source: EMCDDA.

Peru (El Comercio, 2018; Mandujano, 2021) and Brazil (Record TV, 2021), where they work directly with South American drug cartels (see the box '[A large multi-national criminal network importing cocaine to Europe](#)'). The existence of these networks has been revealed through several successful law enforcement operations that have exposed the groups' working methods – for example, multi-layered logistics, a high level of cooperation between different criminal networks and the use of new technology, including encrypted communications (EMCDDA and Europol, 2022; Europol, 2020b).

Albanian-speaking criminal networks appear to have become independent actors with direct connections in Latin America, whereas previously they appeared to work primarily through Italian criminal networks (McDermott et al., 2021; see also the box '[Albanian networks extending control across the cocaine supply chain](#)'). This does not mean that links with Italian groups do not continue to exist, but rather that both sides now appear to work together in different parts of the world in ways that are beneficial to both parties. Overall, there is now a considerable amount of information to suggest that Albanian-speaking networks have expanded their cocaine-related activities to more EU countries since 2017, and that they are also playing a more prominent role in the cocaine market in many countries, with activities that include involvement in street-level distribution (EMCDDA and Europol, 2022; Europol, 2021f).

To an extent, criminal networks engaged in cocaine trafficking with members from countries in the region and neighbouring states (Serbia, Bosnia and Herzegovina, North Macedonia, Montenegro, Croatia, Slovenia) seem to

A large multi-national criminal network importing cocaine to Europe

An international law enforcement operation in 2021 resulted in charges against 61 suspects belonging to a drug trafficking network involved in the wholesale trafficking of cocaine from South America to Europe. This criminal network had a presence in a number of European countries and was composed mainly of criminals originating from Serbia, Croatia, Montenegro and Slovenia. A coordinated law enforcement operation resulted in seizures of 2.6 tonnes of cocaine and

324 kilograms of herbal cannabis, as well as luxury vehicles and large sums of money. Spanish investigators also identified and dismantled the network's other revenue-generating streams, which included the production and trafficking of cannabis and the sale of luxury vehicles. Some members of the organised criminal group were also charged in Slovenia for the distribution of cocaine and cannabis.

Sources: EMCDDA and Europol, 2022; Europol, 2021e.

collaborate easily and efficiently with each other, based on a business mentality that allows actors to work together where mutual benefit is involved (EMCDDA and Europol, 2022). However, there are also a number of instances of violence between such networks involved in the cocaine trade, both within the region and elsewhere (see the section '[Cocaine-related violence in the EU, Western Balkans and South America](#)'). These groups are sometimes collectively referred to as the 'Balkan Cartel', however, the name is misleading and there is insufficient evidence to suggest that there is a Balkan cartel per se but rather an alliance of convenience exists between different loosely connected criminal networks (Djordjevic, 2021).

Cocaine-related violence in the EU, Western Balkans and South America

Violence associated with competition for cocaine markets and routes among Western Balkan criminal networks has been reported in the EU, the Western Balkans and South America. For example, homicides linked to cocaine trafficking have been reported in Albania recently (Oculus News, 2019; Politiko, 2022a; Tirana Post, 2021). Furthermore, homicides related to the cocaine trade have also been reported in various cities in the EU (see also the section '[The role and impact of Western Balkan criminal networks on drug markets in the EU](#)'), as well as in neighbouring countries and cities, such as Kiev, in Ukraine (Replianchuk and Loginova, 2020).

Violence connected to Western Balkan criminal networks has also been reported in South America. However, there it

Albanian networks extending control across the cocaine supply chain

Historically, in the EU, groups involved in the importation of large volumes of cocaine tended to work separately from wholesalers and the gangs responsible for distributing the drug through local drug markets. More recently, instances have been observed of some Albanian-speaking criminal networks appearing to move away from this model and taking control of both the importation and distribution of the drug. For example, one network is known to have utilised sophisticated encrypted communication technologies to maintain contact with the organisation's ringleader, based in Ecuador, who negotiated directly with South American

drug cartels and arranged large shipments of cocaine to major ports in Europe. Accomplices based in Italy, the Netherlands and Albania facilitated this process and were also responsible for distribution to consumers. The cocaine was smuggled across European borders concealed in vehicles equipped with hidden compartments, and the criminals laundered their proceeds using an underground alternative remittance system of Chinese origin, known as the *fei ch'ien* system, similar to the hawala transfer system.

Sources: EMCDDA and Europol, 2022; Europol, 2020b.

seems that these networks have more often been the targets of violence than the perpetrators. This has been the case, for example, in Ecuador, where suspected members of Albanian-speaking networks have fallen victim to mafia-style killings, thought to be linked to criminal activities connected with the port of Guayaquil (Cela and Moran, 2019; EMCDDA and Europol, 2022; Euronews, 2022; Ford, 2021). Further homicides have taken place in Brazil (Record TV, 2021) and Colombia (Análisis Urbano, 2018; EMCDDA and Europol, 2022; Parkinson, 2020).

Overall, Western Balkan criminal networks seem to use violence in a strategic and controlled way, primarily to maintain their credibility as a threat, which is reported to be a key feature of their business model in the cocaine trade (EMCDDA and Europol, 2022; Kemp, 2020b; Townsend, 2019).

argins by extracting value from across the whole supply chain rather than sharing responsibility for parts of the enterprise with other criminal networks. For example, a kilogram of cocaine that reaches Albania at a price of between EUR 20 000 and EUR 25 000 per kilogram can be adulterated and re-sold in western Europe for EUR 35 000 to EUR 42 000 per kilogram – almost eight times more than its reported original price in Latin America (Kemp et al., 2021).

Cocaine prices

The mean retail price of cocaine in the region between 2018 and 2020 was estimated to be around EUR 76 per gram, with Bosnia and Herzegovina reporting the lowest average price (EUR 67/g) and Serbia the highest (EUR 86/g). Cocaine can be bought in doses smaller than 1 gram in some places. In Albania, for instance, it appears that the most commonly sold quantity averages between 0.25 and 0.30 grams, for EUR 25 to 30 per gram. In Bosnia and Herzegovina, Montenegro and Serbia, it is reported that half a gram of cocaine can be bought for between EUR 40 and EUR 50. In addition, in Montenegro, it is possible to purchase a 'line' for around EUR 5 to EUR 10, and it seems that the price is reduced to EUR 70 per gram if a minimum of 5 grams is purchased. In Kosovo, the most popular unit sold is 0.6 grams for around EUR 55 to EUR 60. Other cocaine products also appear to be available in the region, such as crack cocaine, which is reported to be obtainable in Albania in quantities ranging from one tenth to one fifth of a gram at an average price of between EUR 20 and EUR 25 (Kemp et al., 2021).

Based on the available information, the mean wholesale price of cocaine in the region between 2018 and 2020 was estimated at EUR 39 000 per kilogram, with Albania reporting the lowest average price (EUR 30 000/kg) and Serbia the highest (EUR 45 000/kg). At the wholesale level, cocaine is typically sold by the kilogram. As Western Balkans criminal networks are now active along the entire cocaine supply chain, they are thought to be able to negotiate prices per kilogram directly at source, in South America's drug producing countries. This indicates that criminal networks may be able to increase their profit

Heroin and other opioids: use and supply

Heroin remains the main illicit opioid used in the region, and is also one of the most commonly injected drugs. It contributes significantly to overall drug-related harms and remains the primary cause of people seeking treatment for drug use problems.

Trends in reported heroin seizures declined slightly in 2020, although this came after an increase in 2019 and the medium-term picture appears relatively stable. Most of the heroin seized in the region is thought to be destined for the EU, either by land or sea routes. No significant changes in heroin trafficking methods have been noted in recent years. However, as discussed earlier, there is a new concern that links may now exist between the trafficking of cannabis and heroin. This topic merits further investigation and follow-up.

Opioids linked to most harms

Heroin and other opioids continue to be a major cause of drug-related harms in the region, while problems with opioid use are the main reason that people enter drug treatment in the Western Balkan countries. Overdoses related to heroin or other opioids were reported from the four countries for which some mortality data are available.

The available information suggests that heroin is the main illicit opioid used throughout the region, except for Kosovo, where most people entering treatment report the use of methadone, and North Macedonia where methadone is considered to be the most commonly injected drug and is also linked to the majority of reported fatal drug overdoses, often in combination with benzodiazepines. Heroin is typically injected, sometimes alongside other substances including cocaine (EMCDDA, 2021b)

Heroin-related problems may be higher among some minorities, for example, the Roma community appears to be increasingly affected by opioid use in Albania, Kosovo, North Macedonia and Montenegro (EMCDDA, 2021b).

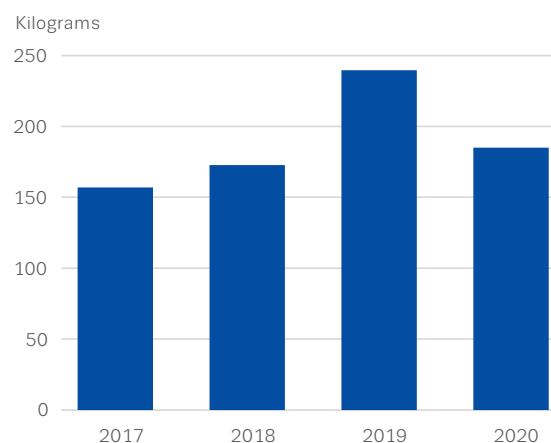
Buprenorphine is also available on the drug market in several countries. In Serbia, around 10 % of clients entering treatment for opioids report buprenorphine as a primary drug; and in Montenegro experts have raised concerns about the possible diversion of medicinal buprenorphine.

Experts' observations suggest that overall the use of heroin in the region may be declining. However, it is not clear whether this signals a fall in overall levels of chronic patterns of problematic drug use or is indicative of heroin simply being replaced in the market by synthetic opioids or other drugs.

Heroin seizures relatively stable during the period 2017-2020

Heroin and morphine seizures appear to have declined slightly in the Western Balkan countries in 2020 (UNODC, 2022). Overall, however, the medium-term picture in the region appeared relatively stable between 2017 and 2020, with a peak in 2019 due to increased seizures in Serbia (see Figure 6). Although cumulative totals are not yet available, more recently some significant seizures are known to have been made. For example, 67.5 kilograms of heroin was reported to have been seized in May 2022 in Kosovo (RTKLIVE, 2022b) and 45.5 kilograms in October 2021 in Albania (Oculus News, 2021). However, a preliminary analysis of the regional data available for 2021 and 2022 do not indicate any significant signs of changes.

FIGURE 6
Heroin seized in Western Balkans, 2017-2020



Source: EMCDDA.

The manufacturing of heroin from morphine may occur in the region

Afghan heroin is mainly smuggled through the Western Balkans en route to the EU, although a portion of these shipments remain in the region for domestic consumption. There are also indications that the final step of the heroin production process, the manufacturing of heroin from morphine, may take place in the Western Balkans. For example, a heroin production facility was reported to have been detected in Albania in 2018 (ABC News, 2018). Producing heroin domestically from imported opiates may yield a much greater profit than reselling imported heroin, but this process requires specialist knowledge, equipment and access to precursor chemicals.

Heroin: trafficked by land and sea

The Balkan land route, from Afghanistan through Iran, Türkiye and the Western Balkan countries, is the shortest and most direct way for heroin to reach European consumer markets, and therefore the most common route for heroin trafficking to the EU (EMCDDA and Europol, 2019). Both the southern and central branches of the Balkan route cross the Western Balkans (Figure 7).

Heroin may enter the region from Bulgaria via Serbia or North Macedonia for further transportation to Albania, Kosovo, Montenegro, and Bosnia and Herzegovina, but shipments may also enter the region from Greece (Bureau for Operational Coordination, 2021; see also the box '67.5

67.5 kilograms of heroin seized in Kosovo

In May 2022, the authorities in Kosovo seized a significant quantity of heroin, totalling 67.5 kilograms, in an operation during which 14 suspects were arrested. According to information provided to the EMCDDA, the heroin was processed in two improvised laboratories in Kosovo by Turkish suspects working together with a local criminal network.

Sources: RTKLIVE, 2022b..

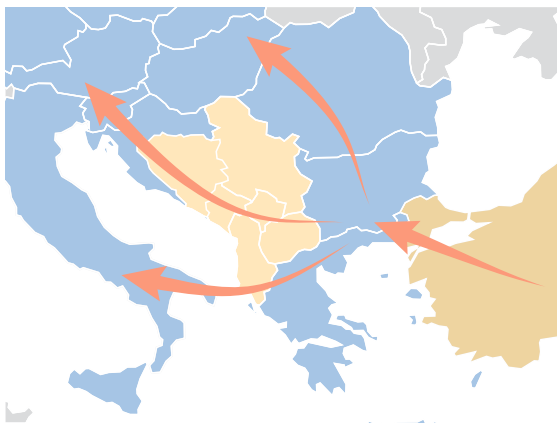
kilograms of heroin seized in Kosovo'). Heroin shipments may then enter the EU by land via Croatia and Hungary, or by sea from Albania to Italy (see also Figure 1). There are several recent examples of this. In October 2021, 45.5 kilograms of heroin was seized in the port of Durrës, loaded into a truck bound for Italy (Oculus News, 2021), and in June 2022, 24 kilograms of heroin was seized in Italy after arriving by ferry from the same port (Kote, 2022a). As previously highlighted, herbal cannabis may be transferred from the Western Balkans to Türkiye in exchange for heroin, creating new opportunities for Western Balkan criminal networks involved in the drugs trade (Mejdini and Amerhauser, 2019; Sinoruka, 2022; US Department of State, 2022).

The main heroin precursor, acetic anhydride, may also be smuggled from the EU to heroin-producing areas via the Western Balkans, with a few cases having been recorded in the past. In 2017, for instance, two separate shipments – of 3 720 and 5 000 kilograms – were seized when attempts were made to smuggle them across the border from Serbia into Bulgaria (Prosecutor's Office of Bulgaria, 2017; Xinhua, 2017).

Heroin prices

The mean retail price of heroin in the region between 2018 and 2020 was reported as EUR 20 per gram, with North Macedonia having the lowest average price (EUR 16.5) and Serbia the highest (EUR 21.5). In Kosovo, heroin is sold small amounts of 0.25 grams for EUR 5. Similar retail practices have been observed in Serbia, where 0.2 grams (a 'shot') is sold for around EUR 7-8. In Montenegro, the most common unit of sale is half a gram, which sells for between EUR 5 and EUR 10, depending on the quality.

FIGURE 7
Branches of the Balkans route



Interviews conducted with heroin users at a harm reduction NGO in North Macedonia suggest that buying the substance in small quantities and consuming it immediately is more common than buying a larger quantity due to the risk of being caught by the police while carrying any unused drugs.

The mean wholesale price of heroin in the region between 2018 and 2020 was EUR 17 000 per kilogram, with Montenegro having the lowest average price (EUR 15 000/kg) and Serbia the highest (EUR 19 000/kg). Across the region, heroin wholesale prices can increase by up to EUR 2 000 per kilogram, with the price tending to increase with every border crossed (Kemp et al., 2021).

Synthetic drugs: use, production and supply

While synthetic drugs include a broad range of substances, the available information in the region relates mostly to amphetamines (amphetamine and methamphetamine) and MDMA. Although amphetamines seem to be less commonly used than other drugs in most countries in the region, the available information suggests similar prevalence levels to many EU countries. Prevalence levels of MDMA use are similar to those reported for amphetamines, but lower than the EU. Expert opinion suggests that MDMA is largely used in night-life or other similar recreational settings.

The local synthetic drug markets appear to be quite variable and dynamic. Demand for synthetic drugs is met mainly by production that takes place outside the region, although some local synthetic drug production has been noted on occasion.

Use of stimulants other than cocaine

Based on the available data, the use of stimulants other than cocaine seems to be relatively uncommon in the region (see the box 'Use of new psychoactive substances'). That said, data from school surveys report levels of use on

Use of new psychoactive substances

Data on the use of new psychoactive substances (NPS) are extremely limited. Some indication of their presence on the regional drug market can be obtained from the EWSD in 2021, where between 9 % of respondents in Montenegro and 23 % in North Macedonia reported using some NPS in the last year. While these results point to the presence of NPS on the regional drug market, they cannot be generalised to any larger population. In the 2019 ESPAD survey, between 1 % of students in North Macedonia and 2.6 % in Montenegro reported the use of any NPS. Qualitative reports from the field suggest the sporadic use of fentanyl by people who inject drugs, as noted in Montenegro. Synthetic cannabinoids also appear to be popular in Serbia. Overall, however, insufficient quantitative data and forensic studies are available to permit informed comment on trends in the availability and use of NPS in the region.

a par or even greater than the European average among adolescents. However, plausible measurement error means that any difference should be interpreted with caution. For instance, in 2019, lifetime prevalence of amphetamine use among 15- to 16-year-olds was 2 % in both Montenegro and Serbia, while the average figure across all ESPAD countries was 1.3 % (ESPAD, 2021). Similarly, the use of methamphetamine by school students exceeded the European average in Albania in 2015 and in Montenegro and Serbia in 2019, while MDMA use was also comparatively high in Albania in 2015 and in Montenegro in 2019. Among young adults, apart from MDMA use in Montenegro and amphetamine use in Montenegro and North Macedonia, the data available suggest that prevalence rates of synthetic stimulant use in the region are lower than those typically reported in the EU.

According to observations by practitioners in the field, the use of MDMA increases in the summer with the influx of foreign tourists and expats returning home for holidays.

Synthetic drug seizures

Amphetamine was the most seized synthetic drug in the region between 2017 and 2020, followed by MDMA (see Figure 8) (?). Amphetamine seizures in this period were mainly carried out in Bosnia and Herzegovina, North Macedonia and Serbia. North Macedonia seized nearly all the amphetamine reported during this period in 2017, when an illicit production laboratory was dismantled (see the box 'Dismantling of synthetic drug production facilities in North Macedonia and Serbia'). Of all the countries in the region, Serbia reported the most MDMA seizures between 2017 and 2020, followed by Bosnia and Herzegovina.

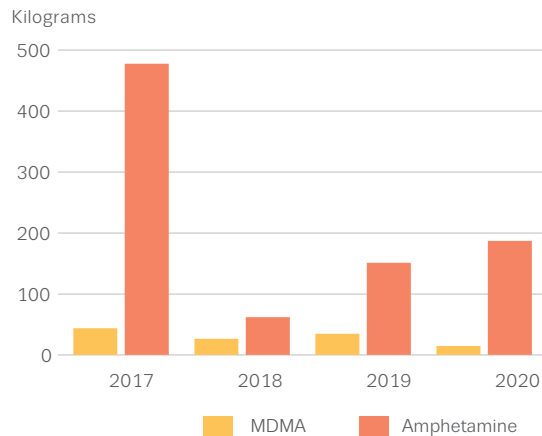
Very small quantities of synthetic drugs were also seized in Albania, Kosovo and Montenegro, with less than 6 kilograms of amphetamine, methamphetamine and MDMA seized between 2017 and 2020.

Production of synthetic drugs appears to be uncommon in the region

Currently the Western Balkans do not appear to play a major role in the production of synthetic drugs. There have

(?) Seizures of synthetic drugs were reported in both kilograms and tablets. To allow comparability, quantities reported in tablets were converted into kilograms using an estimate of 250 mg per tablet.

FIGURE 8
Amphetamine and MDMA seized in Western Balkans,
2017-2020



Source: EMCDDA.

been reports of a small number of amphetamine production sites being detected and dismantled, for example in North Macedonia and Serbia (Ministry of Interior of North Macedonia, 2017), and more recently in Bosnia and Herzegovina (Klix, 2022). In addition, one MDMA production facility was apparently dismantled in Serbia in 2017, although few details are available (B92, 2017; RTS, 2017).

Dismantling of synthetic drug production facilities in North Macedonia and Serbia

In 2017, a joint operation by authorities from North Macedonia and Serbia in 2017, with international support, uncovered a large synthetic drug production facility with sophisticated equipment in Tetovo, North Macedonia. In conjunction, other synthetic drug production sites were discovered in North Macedonia and Serbia. During the operational phase, over 125 kilograms of drugs and precursors were seized, as well as weapons. The illicit production facility was reportedly also producing amphetamine tablets with the 'Captagon' logo, probably intended for the Turkish and Middle Eastern markets.

Sources: Ministry of Interior of North Macedonia, 2017; SELEC, 2017.

Transshipment of synthetic drugs and precursors

Currently, criminal networks from the Western Balkans seem to have less involvement in the trafficking of synthetic drugs compared to other substances. Although a number of Serbian networks are believed to be involved in some relatively minor trafficking of synthetic drugs produced in the EU into the region (Ministry of Interior of Serbia, 2020a), at present, the available information suggests that the engagement of criminal networks in this market is limited. That said, given the highly dynamic nature of the drug market, the difficulties in detecting illicit production sites, and the profits that can be made from synthetic drug production, this area merits ongoing monitoring and further investigation.

To the limited extent that such trafficking does occur, drug precursors and synthetic drugs are brought into and transited through the Western Balkans using a number of routes, including the Balkan route for heroin (EMCDDA and Europol, 2019; UNODC, 2020). This has become apparent from seizures in the region in recent years, such as in Bosnia and Herzegovina (Dnevik, 2019; SIPA, 2019), North Macedonia (Republika, 2021; SELEC, 2022) and Serbia (NewsBeezer, 2020).

Precursors typically transit the region by land or by air. In February 2022, more than 1.1 tonnes of precursors for the production of amphetamine and methamphetamine, trafficked from China via Türkiye, was seized at Skopje International Airport in North Macedonia as part of an international controlled delivery operation (RadioFreeEurope, 2022; SELEC, 2022). These precursors were likely destined for the EU.

Synthetic drug prices

Amphetamine (often referred to as 'speed') and MDMA or related substances are the most common synthetic drugs available in the region and are traditionally sold in tablets or grams. The data available are limited but would suggest that the mean regional retail price of amphetamine between 2018 and 2020 was around EUR 12 per gram. In North Macedonia, amphetamine is reportedly sold in batches of 5 grams for around EUR 38 or in an unquantified 'small roll' for EUR 32 (Kemp et al., 2021). The mean wholesale price of amphetamine in the region for the period 2018-2020 is thought to have been around EUR 3 000 per kilogram.

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About this publication

This report presents a comprehensive analysis of the drug situation in the Western Balkans focused on health and security aspects. It provides a holistic and strategically oriented understanding of the drug situation by bringing together the available information on drug policies and interventions, patterns of drug use and their consequences, as well as data on drug production and trafficking, and how these may impact on broader security-related concerns. The publication was prepared in the framework of the EMCDDA-IPA7 project, financed by the European Commission.

About the EMCDDA

The European Monitoring Centre for Drugs and Drug Addiction (EMCDDA) is the central source and confirmed authority on drug-related issues in Europe. For over 25 years, it has been collecting, analysing and disseminating scientifically sound information on drugs and drug addiction and their consequences, providing its audiences with an evidence-based picture of the drug phenomenon at European level.

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